



Transaction Coordinator

For Contracts

- Thoroughly review all deadlines and timelines
- Send executed contract to all parties in the transaction
- Confirm escrow deposit and obtain receipt
- All parties contacted via an introduction by me as a member of the Graystone team by phone and e-mail

Inspections

- Setup/Confirm that inspections for both home and termite are scheduled within the time frame of contract and ensure all parties have been informed
- I will attend the Inspection/Appraisal in your place (Depending on Distance)
- Negotiate repairs as needed and will prepare any addendum
- Monitor repairs and collect receipts before closing

Condominiums/HOA

- Obtain copies of deed restrictions/condo docs and confirm the buyer has received them
- Make sure the buyer makes application and interview if required
- Confirm approval is received by the title company

Financing

(Regardless of if seller or buyer side)

- Confirm the buyer has made application
- Make sure appraisal has been ordered
- Follow-up with lender for appraisal results
- Monitor underwriting process through receipt of loan commitment followed by the clear to close

Title Company

- Help get any details needed
- Review title commitment
- Acquire existing survey and title policy (if they exist and are still valid)
- Make sure new survey is ordered and elevation certificate if needed
- Coordinate mail away closings



- Make sure the home warranty is ordered either by the title company or us -send receipt to client

Insurance

- Ensure that all insurance related tasks are performed. For example: 4 point and Wind Mitigation
- Make sure the buyer gets insurance quotes (home and flood) and it will be binding for closing date
- Provide the title company and lender with all documentations and invoices

Before Closing

- Provide Title Company with DA and final walk-thru form
- Schedule final walk-thru
- Coordinate closing time and place with all parties
- Provide the seller and buyer contact information regarding turning on/off utilities
- Send closing instructions to buyer and seller
- Make certain that the lender's closing documents are delivered to title Company
- Review the final CD and make sure all charges are correct
- Confirm that buyer has received final amt due at closing or that the seller receives proceeds amt
- Make sure there are keys and garage remotes at closing
- Get clients forwarding address
- Buyers will receive a list of resources, see attached*

After Closing

- Upload all closing docs into compliance system, Paperless Pipeline
- Make sure checks are received

If Contract Cancels

- Prepare release and cancellation of contract
- Send executed release to the title company
- Make sure the client gets their earnest money back