Transaction Coordinator Services

BERKSHIRE HATHAWAY
HomeServices
Select Properties

WE MANAGE YOUR FILES. YOU SELL MORE HOMES.

Listing Presentation Services

SELECT TIER 1: $50

*Listing agent provides complete MLS profile, remarks and photos

Presentation binder to leave in the home to include:

1. In House Marketing Binder:
   - 25 copies of color flyers
   - MLS report flyer
   - 15 copies of lead base paint if built prior to 1978
   - 15 copies of Seller's Disclosure
   - Sign-in sheet with pens (not required)
   - H S A brochures
   - Finance flyers from USA Mortgage
   - School district information (if agent provides)
   - List of recent updates, list provided by agent from seller
2. Open House Sign-in sheet and email link for electronic sign in
3. Create QR code
4. Create Property Webpage
5. Special Feature cards
6. Just Listed cards through Xpressdocs

SPECIAL FEATURES FOR CARDS:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________

No Training Needed. No Overhead!

It's like having an assistant that you don't pay taxes or insurance on, or need for office space.

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Listing Presentation Services

SELECT TIER 2: $200

*Listing agent provides complete MLS profile, remarks, directions, associated listing documents and photos

Includes Tier 1 plus the following:

1. Enter client/transaction info into CRM & DotLoop all Listing Docs
2. Client correspondence delivered via email, including:
   - Congratulations and introduction letter
   - Copy of all Signed Listing pertinent documents & link to Property Webpage
   - Feedback Setup for Showings and Open Houses
3. After listing input, verify listing information through industry websites: ie; Zillow, Realtor.com and Trulia
4. Add to Office Property Tour/Virtual Tour
5. Order H S A warranty if applicable & upload in MLS & DotLoop
6. Set up and maintain Adwerx, CRM, Sellers Edge Report, HomeSnap, ShowingTime, Social Media Marketing
7. Create listing expiration calendar invite
8. Order Just Listed cards from Xpressdocs if not ordered in Select Tier 1 package
9. E-blast listing to contacts and agents from CRM & Buyside Matches
10. Schedule Marketing for first Open House

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SELECT TIER 3
SELLER / BUYER CLOSING PACKAGE

Fee Paid Only If Property Closes: $200

1. Within 48 hours notify all parties that Transaction Coordinator is representing the agent
2. Obtain and verify all contract documents are complete and accurate in SkySlope
3. Order H S A warranty if applicable
4. Forward copies to Lender, Select Title Group
5. Client correspondence delivered via email, including:
    - Congratulations and introduction letter
    - Copy of sale contract and all attached pertinent documents
    - Required municipal and/or fire inspection(s) if applicable
    - Closing checklist sent to client with date, time, location, utility contact list and client responsibilities for the closing
6. Schedule contract deadlines to Agent's Outlook calendar with set reminders
7. Update CRM Transaction and Contact info
8. Verify earnest money is deposited in accordance with the contract, receipt added to SkySlope
9. Confirm all Deadline Dates have been obtained by deadline and update all parties
10. Update miscellaneous company paperwork (payout sheet, etc.) as needed
11. Draft document amendments dictated by Agent
12. Follow up with lender on appraisal order status
13. Schedule walk through and coordinate closing with all parties
14. Obtain copy of the ALTA forward to Agent for accuracy review and to client to review
15. Keep Maris Status Changes Updated
16. If LISTING agent didn't order Complimentary 50 Just Listed cards from Xpressdocs order Just Sold cards for Listing Agent. If Buyers Agent wants Just Sold cards, company does not provide these complimentary
17. Send thank you card to other agent.

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ONBOARDING FORM

1. Your Name ______________________________
2. Your Email ______________________________
3. Cell Phone Number ______________________________
4. Preferred form of communication: *Circle One* ☐ Phone Call ☐ Email ☐ Text Message
5. Where do you store your executed contract documents ______________________________

____
6. Usernames and Passwords for any programs we need to work with you? *Add T.C. as Facebook Account Editor
   - Maris: ______________ ______________
   - DotLoop: ______________ ______________
   - REWS: ______________ ______________
   - ShowingTime: ______________ ______________
   - BHHS REsource: ______________ ______________
   - XpressDocs: ______________ ______________
7. Select Title Company, Contact Person, and Location? ______________________________

____
8. Preferred Lender, Contact Person, and Location? ______________________________

____
9. Who is your broker and what is their information? ______________________________

____
10. Any special commission splits, team members, etc? ______________________________

____
11. The listing packages offer 25 flyers - do you like the flyer from REWS or Resource Center, or do you have a template of a flyer you like? ______________________________

____
12. What location do you close at? Title? Office? ______________________________

____
13. Preferred Inspection Companies? List 3 in order of who you would want contact first.

1.______________ 3.______________

2.______________
14. Any other preferred contractors or companies you want your clients to reach out to first?Insurance?

____

____

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INTAKE ORDER FORM

1. Your email (this will be the email we use to communicate) ______________________
2. Your Name ______________________
3. Cell # ______________________
4. Contract Address ______________________

   ____
5. Buyer or Seller Side ______________________
6. Inspection Negotiations - Agent, Transaction Broker, or Inspections Waived ______________________

   ____
7. Type of sale - Resale, condo, new construction, or relocation ______________________

   ____
8. Client Name - Phone number and Email ______________________

   ____
9. Clients preferred form of communication ______________________
10. Client Marital Status ______________________
11. What percentage commission you expect to receive? ______________________
12. What fixed commission did you charge? ______________________
13. Who is paying the fixed commission? Client or agent? ______________________
14. Co-Agent Contact information ______________________

    ____
15. Is the property staged? (Seller Only) ______________________

CHOOSE YOUR SERVICE

☐ **Select Tier 1**, $50 due at the time of service

☐ **Select Tier 2**, $200 due at the time of service (Includes Select Tier 1)

☐ **Select Tier 3**, $200 fee paid only if and when the property closes

*If the property is mutually released a $50 charge will apply

Agent Signature: ______________________ **Date:** ______________________

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