

# 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. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 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 & SkySlope 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
  - Required municipal and/or fire inspection(s)/Condo Re-sale Certificates if applicable
  - Feedback Setup for Showings and Open Houses
3. Input in MLS & Upload seller's disclosures and other applicable documents to Maris, and keep Maris updated throughout Listing
4. After listing input, verify listing information through industry websites: ie; Zillow, Realtor.com and Trulia
5. Add to Office Property Tour/Virtual Tour
6. Order H S A warranty if applicable & upload in MLS & SkySlope
7. Set up and maintain Adwerx, CRM, Sellers Edge Report, HomeSnap, ShowingTime, Social Media Marketing
8. Create listing expiration calendar invite
9. Order Just Listed cards from Xpressdocs if not ordered in Select Tier 1 package
10. E-blast listing to contacts and agents from CRM & Buyside Matches
11. 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. Setup quick fire for Testimonial Tree (CRM)
16. Keep Maris Status Changes Updated
17. 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
18. 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: \_\_\_\_\_  
Skyslope: \_\_\_\_\_  
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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