

## TRANSACTION COORDINATION SHEET (SELLER'S AGENT)

Property Listing Through Expiration or Close of Escrow (COE)

**NOTE:** This form is used by a seller's agent and their transaction coordinator when managing employment by a seller and diligently marketing the property and locating a buyer, to review a checklist of activities for consideration, identify those tasks completed and note those remaining to be performed.

**DATE:** \_\_\_\_\_, 20\_\_\_\_. Prepared by \_\_\_\_\_.

**FACTS:**

Property address \_\_\_\_\_

Seller's agent \_\_\_\_\_ CalBRE # \_\_\_\_\_

Listed price \$ \_\_\_\_\_,

Broker fee \$ \_\_\_\_\_, or \_\_\_\_\_%

Property data:  Seller occupied,  Tenant,  Vacant,

SFR,  Condo,  Two-to-four units,

HOA,  Property is in foreclosure,

NOD recorded \_\_\_\_\_, 20\_\_\_\_,

short sale,  estate sale, court approval required.

Seller's name \_\_\_\_\_

Mailing address \_\_\_\_\_

Phone \_\_\_\_\_, Cell \_\_\_\_\_,

Email \_\_\_\_\_

Buyer's agent (when known) \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_, Cell \_\_\_\_\_

Email \_\_\_\_\_

Date purchase agreement accepted \_\_\_\_\_, 20\_\_\_\_

Date scheduled for close of escrow \_\_\_\_\_, 20\_\_\_\_

Escrow company \_\_\_\_\_, Officer \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Transaction Coordinator:		
Name	_____	
Address	_____ _____	
Phone	_____	
Cell	_____	
Email	_____	
<b>Deadlines</b> for due diligence confirmation, performance, or cancellation.		
Deadline Date	Activity	Cleared

Check Items Needed	Outside Reports/Docs		Internal Reports/Docs		Itemized Listing, Marketing, and Closing Activities:
	Date Ordered/ Requested	Date Received	Date Sent	Date Returned	<b>LISTING TAKEN:</b>
					Seller's Listing Agreement — Exclusive Right to Sell, Exchange or Option [RPI Form 102]
					Agency Law Disclosure — Real Estate Agency Relationships [RPI Form 305]
					Listing Package Cost Sheet [RPI Form 107]
					Listing information to marketing/advertising
					Photo taken, picked up, distributed
					Weekly ads mailed

Check Items Needed	Outside Reports/Docs		Internal Reports/Docs		Itemized Listing, Marketing, and Closing Activities:
	Date Ordered/Requested	Date Received	Date Sent	Date Returned	<b>LISTING TAKEN:</b> (continued)
					Flyer designed, printed, delivered to property
					Seller's signed approval for flyer
					Thank you letter — Seller
					"For Sale" sign ordered
					Good Faith Estimate of Seller's Net Proceeds — On Sale of Property [RPI Form 310]
					Federal Residency Declarations — Citizen Status [RPI Form 301]
					Seller's Real Estate Withholding Certificate [RPI Form 301-1]
					Comparative Market Analysis for Setting Values [RPI Form 318]
					MLS profile sheet — Broker Load
					Internet submission
					Key-Safe Installed
					Listing Information Report — For Broker's Administrative Use [RPI Form 522]
					<b>MARKETING/LISTING PACKAGE:</b>
					Condition of Property Disclosure (TDS) [RPI Form 304]
					Lead-Based Paint Disclosure [RPI Form 313]
					Residential Earthquake Hazards Report [RPI Form 315]
					Property Expense Report [RPI Form 306]
					Seller's Neighborhood Security Disclosure [RPI Form 321]
					Property profile from title company
					Natural Hazard Disclosure [RPI Form 314]
					HOA documents and CC&Rs [RPI Form 135]
					Home Inspection Report [RPI Form 130]
					Structural Pest Control Inspection [RPI Form 132]
					Structural Pest Control Report
					Structural Pest Control Clearance
					Other Service Report _____.
					City Occupancy Retrofit Inspection [RPI Form 133]
					City Occupancy/Retrofit Report
					City Occupancy/Retrofit Certificate
					Work Authorization [RPI Form 108]

Check Items Needed	Outside Reports/Docs		Internal Reports/Docs		Itemized Listing, Marketing, and Closing Activities:
	Date Ordered/Requested	Date Received	Date Sent	Date Returned	<b>MARKETING/LISTING PACKAGE:</b> (continued)
					Notice of Mello-Roos Assessment [RPI Form 137]
					Modification of Listing Agreement [RPI Form 120]
					Expired Listing Report – Or By Cancellation [RPI Form 522-1]
					<b>PROPERTY SOLD:</b>
					Sold price \$_____
					Broker fee \$_____, or _____%
					Purchase Agreement [RPI Form 150]
					Counteroffer [RPI Form 180]
					Agency Law Disclosure (attached to Purchase Agreement) [RPI Form 305]
					Broker Fee Addendum (if not in Purchase Agreement) [RPI Form 273]
					Contingency addendum for _____ _____
					Copy of Buyer's deposit check(s)
					Disclosures not in Purchase Agreement: <input type="checkbox"/> water heater anchor, <input type="checkbox"/> smoke detectors, <input type="checkbox"/> industrial use area, <input type="checkbox"/> military ordnance, <input type="checkbox"/> airport influence area, <input type="checkbox"/> rent control area, <input type="checkbox"/> sex offender registry, <input type="checkbox"/> supplement tax bills, <input type="checkbox"/> confirmation of broker's agency, <input type="checkbox"/> _____
					Property Sold Report — Administrative and Fee Information [RPI Form 523]
					Buyer's Occupancy Statement on Seller's Federal Residency Declaration [RPI Form 301]
					Authorization to Prepare Sales Escrow Instructions [RPI Form 136]
					Escrow Instructions — Buyer and Seller Instructions [RPI Form 401]
					Statement of Information — For General Index Search [RPI Form 401-4]
					Preliminary Title Report
					Property Inspection — Request for Repairs [RPI Form 269]
					Final Walk- Through Inspection [RPI Form 270]
					Authorization to Open Home Warranty Order [RPI Form 134]
					Closing Disclosure [RPI Form 402]
					Transmittal Stack Sheet on Sale to Broker [RPI Form 523-1]
					For Sale sign ordered down
					Key-safe removal
					Broker-Load listing removed

**SPECIAL HANDLING CHECKLIST:**

**Instructions:** Check the box to indicate the referenced form is to be incorporated into the underlying transaction. Then transfer the checked form into a blank row provided in the coordination sheet.

- Right to Enter and Exhibit Unit to Buyers [RPI Form 116]
- Compensation Disclosure in a Real Estate Transaction [RPI Form 119]
- Identification of Prospective Buyers – On Expiration of Listing [RPI Form 122]
- Equity Purchase Agreement [RPI Form 156]
- Lease-Option – Contract for Deed [RPI Form 163]
- Offer for Lease-Option [RPI Form 164]
- Offer for Land Sales Contract [RPI Form 167]
- Land Sales Contract [RPI Form 168]
- Cancellation of Purchase Agreement – Release and Waiver of Rights [RPI Form 181]
- Notice to Perform and Intent to Cancel [RPI Form 181-1]
- Affiliated Business Arrangement Disclosure Statement [RPI Form 205]
- Authorization to Prepare Appraisal Report [RPI Form 228]
- Personal Property Inventory – Transferred with Real Estate [RPI Form 256]
- Confirmation of Value Addendum – Price Appraisal Contingency [RPI Form 266]
- Interim Occupancy Agreement – Receipt for Rented Security Deposit [RPI Form 271]
- Holdover Occupancy Agreement [RPI Form 272]
- Short Sale Addendum – Loan Discount Approval Contingency [RPI Form 274]
- Leasing and Operating Addendum [RPI Form 275]
- Backup Offer Addendum — Cancellation of Prior Sale Contingency [RPI Form 276]
- Notice of Satisfaction of Backup Contingency – Commencement of Performance [RPI Form 276-1]
- Preliminary Title Report Approval – A Due Diligence Contingency [RPI Form 277]
- Court Confirmation Addendum – A Contingency Provision [RPI Form 278]
- Financial Disclosure Statement – Carryback Note [RPI Form 300]
- Financial Disclosure Statement – Land Sales Contract [RPI Form 300-1]
- Financial Disclosure Statement – For Entering into a Lease-Option Sale [RPI Form 300-2]
- Credit Application – Individual [RPI Form 302]
- Foreclosure Cost Sheet – Net Proceeds on Resale [RPI Form 303]
- Assumption Agreement – Unsecured and Subrogated [RPI Form 431]
- Assumption Agreement – Secured [RPI Form 432]
- Power of Attorney – Uniform Statutory Form [RPI Form 447]
- Trust Deed – Securing Assumption Agreement [RPI Form 451]
- Escrow Instructions to Disclose Broker Fee [RPI Form 524]
- Conflict of Interest Disclosure [RPI Form 527]
- Change of Owner or Property Manager – Addendum to Rental Or Lease Agreement [RPI Form 554]
- Disposition of Deposit on Sale of Tenant-Occupied Premises [RPI Form 586]
- Tenant Estoppel Certificate [RPI Form 598]