

## TRANSACTION COORDINATION SHEET (SELLER'S AGENT)

Property Listing Through Expiration or COE

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

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

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

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

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

Brokerage fee \$ \_\_\_\_\_, or \_\_\_\_\_%

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

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

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

Email \_\_\_\_\_

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.

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

Reports/Docs Needed		Prepare, Sign, Return		Check Items Needed	Itemized Listing, Marketing, and Closing Activities:
Ordered or Requested Date	Received Date	Sent to Date	Returned Date		LISTING TAKEN:
					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

Reports/Docs Needed		Prepare, Sign and Return		Check Items Needed	Itemized Listing, Marketing, and Closing Activities:
Ordered or Requested Date	Received Date	Sent to Date	Returned Date		LISTING TAKEN: (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 – Transfer Disclosure Statement (TDS) [RPI Form 304]
					Lead-Based Paint Disclosure – On Sale of Real Estate [RPI Form 313]
					Residential Earthquake Hazards Report [RPI Form 315]
					Property Expense Report [RPI Form 306]
					Criminal Activity and Security Disclosure Statement [RPI Form 321]
					Property profile from Title Company
					Natural Hazard Disclosure [RPI Order Form 131]
					CID (HOA) Documents [RPI Order Form 135]
					Home Inspection Report [RPI Order Form 130]
					Structural Pest Control Inspection [RPI Order Form 132]
					Structural Pest Control Report
					Structural Pest Control Clearance
					Other Service Report _____.
					City Occupancy Retrofit Inspection [RPI Order Form 133]
					City Occupancy/Retrofit Report
					City Occupancy/Retrofit Certificate
					Work Authorization [RPI Form 108]

Reports/Docs Needed		Prepare, Sign and Return		Check Items Needed	Itemized Listing, Marketing, and Closing Activities:
Ordered or Requested Date	Received Date	Sent to Date	Returned Date		MARKETING/LISTING PACKAGE: (continued)
					Notice of Mello-Roos Assessment [RPI Order 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 \$ _____
					Brokerage fee (office) \$ _____, or _____%
					Purchase Agreement – One-to-Four Residential Units [RPI Form 150]
					Counteroffer [RPI Form 180]
					Agency Law Addendum (attached to Purchase Agreement) [RPI Form 305]
					Contingency addendum for _____ _____ _____
					Brokerage Fee Addendum [RPI Form 273]
					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 area, <input type="checkbox"/> airport influence area, <input type="checkbox"/> rent control area, <input type="checkbox"/> sex offender register, <input type="checkbox"/> supplemental 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 – For SFR or CID Unit Take Sheet [RPI Form 136]
					Escrow Instructions – Buyer and Seller Instructions [RPI Form 401]
					General Index I.D. Information [RPI Form 401-4]
					Preliminary title report
					Initial Property Inspection – Request for Repairs [RPI Form 269]
					Final Walk-Through Inspection – Final Condition-of-Property Confirmation [RPI Form 270]
					Home Warranty Policy [RPI Order Form 134]
					Estimated Settlement Statement for Seller [RPI Form 402]
					Transmittal Stack Sheet on Sale – Administrative File Review [RPI Form 523-1]
					For Sale sign ordered down
					Key-safe removal
					Broker-Load listing removed

**SPECIAL HANDLING CHECKLIST:**

**Instructions:** Enter items on the coordination sheet above as necessitated by provisions in the Purchase Agreement.

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