

TRANSACTION COORDINATION SHEET (BUYER'S AGENT)

Prospective Purchase Through COE

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

Prepared _____, 20____, by _____.

Property address _____

Purchase price \$ _____

Broker fee (for office) \$ _____, or _____%

Seller's name _____

Property data: Seller occupied, Tenant, Vacant,

SFR, Condo, two-to-four units,

HOA, Property is in foreclosure,

NOD recorded _____, 20____,

Short sale, estate sale; approval required.

Seller's Agent _____, Office _____

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	_____	
Deadlines for due diligence confirmation, performance, or cancellation.		
Deadline Date	Activity	Cleared

Reports/Docs Needed		Prepare, Sign, Return		Check Items Needed	Itemized Purchase and Closing Activities:
Ordered or Requested Date	Received Date	Sent to Date	Returned Date		
					PRE-OFFER Property Analysis:
					MLS printout on suitable property – Listing #: _____
					Flyer listing amenities of suitable property
					Comparable Market Analysis for Setting Values [RPI Form 318]
					Hazard Insurance Conditions [RPI Form 261]
					Condition of Property Disclosure (TDS) [RPI Form 304]
					Home Inspector's Report – from Seller
					Lead-Based Paint Disclosure – On Sale [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

Reports/Docs Needed		Prepare, Sign, Return		Check Items Needed	Itemized Purchase and Closing Activities
Ordered or Requested Date	Received Date	Sent to Date	Returned Date		PRE-OFFER Property Analysis: (continued)
					Natural Hazard Disclosure Statement [RPI Form 314]
					HOA documents and CC&Rs
					Structural Pest Control Report
					Local Occupancy Report/Certificate
					Notice of Mello-Roos Assessment
					PROPERTY ACQUISITION:
					Purchase Agreement _____ [RPI Form 150]
					Counteroffer _____ [RPI Form 180]
					Agency Law Disclosure [RPI Form 305]
					Brokerage Fee Addendum (if not in Purchase Agreement) [RPI Form 273]
					Contingency Addendum for _____ _____ _____
					Buyer's Deposit Check
					Copy of Buyer's Deposit Check
					Disclosures not covered 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"/> _____
					Buyer Receipt of Hazard Booklet(s) [RPI Form 316]
					Adjustable Rate Mortgage (ARM) Disclosure [RPI Form 320]
					Buyer's Occupancy Exemption (if Non-residential Alien Seller)
					Authorization to Prepare Sales Escrow Instructions [RPI Form 136]
					Escrow Instructions [RPI Form 401]
					General Index Information on Identification [RPI Form 401-4]
					Preliminary Title Report
					Termite Clearance
					Property Inspection – Request for Repairs [RPI Form 269]
					Final Walk-Through Inspection [RPI Form 270]

Reports/Docs Needed		Prepare, Sign, Return		Check Items Needed	Itemized Purchase and Closing Activities
Ordered or Requested Date	Received Date	Sent to Date	Returned Date		PROPERTY ACQUISITION: (continued)
					Authorization to Open Home Warranty Order [RPI Form 134]
					Settlement Statement – Sale [RPI Form 402]
					Transmittal Stack Sheet on Sale to Broker [RPI Form 523-1]

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 519]
- _____ 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]
- _____ Long Form Trust Deed – Securing other Performance [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]