TRANSACTION COORDINATION SHEET (BUYER'S AGENT)

Prospective Purchase Through Close of Escrow (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 a checklist of activities for consideration, identify those tasks completed and note those remaining to be performed.

completed and note	THOSE TEITIBIL	ing to be per	Torried.				
DATE:	, 20	Prepared	by				
FACTS:							
Property address							
Buyer's agent					_CalBRE #		
Purchase price \$,					
Broker fee (for office)	\$, or	%		nsaction Coordinate	
Property data: □ Selle	er occupied, [ı Tenant, □ V					
\square SFR, \square Condo,	□ Two-to-fou	r units,					
□ HOA, □ Propert	y is in foreclo	sure,					
NOD recorded		, 20	,				
□ short sale, □ es	tate sale, cou	irt approval r	equired.				
Buyer's name							
Mailing address						or due diligence d	confirmation,
Phone		, Cell _		,	performance,	or cancellation.	
Email					Deadline	A - Marita	Oleanad
Seller's name					Date	Activity	Cleared
Seller's agent, Office							
Address							
Phone		_, Cell			1		
Email							
Date purchase agree	ment accepte	ed	,	20			
Date scheduled for cl	ose of escrov	v		20	1		I
Escrow company				, Officer			
Address							
Phone				Email			
Outside Re	eports/Docs	Internal Re	ports/Docs		Itemized Purchase	and Closing Activities:	
Check Items Needed Date Ordered/ Requested	Date Received	Date Sent	Date Returned		PRE-OFFER	Property Analysis:	
				MLS printout or	n suitable property –	Listing #:	
				Flyer listing am	enities of suitable pr	roperty	
				Comparable Ma	arket Analysis for Se	etting Values [RPI Form 31	8]
				<u> </u>	ice Conditions [RPI I		

Needed	Ordered/ Requested	Received	Date Sent	Returned	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 [RPI Form 313]
					Residential Earthquake Hazards Report [RPI Form 315]
					Property Expense Report [RPI Form 306]
					Seller's Neighborhood Security Disclosure [RPI Form 321]

Check	Outside Re	ports/Docs	Internal Re	ports/Docs	Itemized Purchase and Closing Activities:
Items Needed	Date Ordered/ Requested	Date Received	Date Sent	Date Returned	PRE-OFFER Property Analysis: (continued)
					Property Profile from title company
					Natural Hazard Disclosure Statement [RPI Form 314]
					HOA documents and CC&Rs [RPI Form 135]
					Structural Pest Control Report
					Local Occupancy Report/Certificate
					Notice of Mello-Roos Assessment [RPI Form 137]
					PROPERTY ACQUISITION DOCUMENTS:
					Purchase Agreement [RPI Form 150]
					Counteroffer [RPI Form 180]
					Agency Law Disclosure [RPI Form 305]
					Broker 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 in Purchase Agreement:
					□ water heater anchor, □ smoke detectors,
					□ industrial use area, □ military ordnance, □ airport influence area, □ rent control area,
					□ sex offender registry, □ supplement tax bills,
					confirmation of broker's agency, Constitution of broker's agency, Confirmation of broker's ag
					Buyer Receipt of Hazard Booklet(s) [RPI Form 316]
					Adjustable Rate Mortgage (ARM) Disclosure [RPI Form 320-1]
					Buyer's Occupancy Exemption (if Non-Residential Alien Seller)
					Authorization to Brown Out 5
					Authorization to Prepare Sales Escrow Instructions [RPI Form 136]
					Escrow Instructions [RPI Form 401]
					Statement of Information — For General Index Search [RPI Form 401-4]
					Preliminary Title Report
					Structural Pest Control Clearance
					Property Inspection – Request for Repairs [RPI Form 269]
					Final Walk-Through Inspection [RPI Form 270]

Check	Outside Re	Outside Reports/Docs Internal Reports/Docs Itemized Purchase and Closing Activities:		Itemized Purchase and Closing Activities:	
Items Needed	Date Ordered/ Requested	Date Received	Date Sent	Date Returned	PROPERTY ACQUISITION: (continued)
					Authorization to Open Home Warranty Order [RPI Order Form 134]
					Closing Disclosure [RPI Form 402]
					Transmittal Stack Sheet on Sale to Broker [RPI Form 523-1]

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

transfer the checked form into a blank row provided in the coordination sheet.
□ Right to Enter and Exhibit Unit to Buyers [RPI From 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]