

**Totality Coordinating
Task List
Single Side | Dual Side**

**Compliance Only
\$150**

**Full Contract to Close
\$350 | \$600**

Broker Requirements

Review Uploaded Documents for Quality Control and Confirm Execution	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Upload all contract documents into office compliance system	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Complete required Broker Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Request Disbursement Authorization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Deliver Disbursement Authorization to Settlement Agent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Contract

Review and compute contractual deadlines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact all parties involved in the transaction (escrow, title, lender, cooperating agent), draft introduction emails and provide a working timeline with action items	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Confirm escrow deposit	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Request wiring instructions from escrow agent	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Confirm receipt of escrow money	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Provide introduction email to Buyer and/or Seller. Introducing ourselves as a member of your team	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Extensions/Addenda - draft document, obtain approval from the partnered agent and circulate/track signatures, deliver to all applicable parties executed document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Condos and HOAs

Obtain copies of governing documents as dictated by purchase agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Confirm receipt of approval by the title company	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ensure buyer has received resale certificate	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Inspections

Schedule/Confirm inspections requested or required within the timeframe of contract and inform all involved parties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Follow up with Listing Agent/Seller to confirm repair status and receive invoices or pictures. Schedule re-inspection if necessary	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Receive Executed Repair Amendment or Amendment from the partnered agent and deliver to appropriate parties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Financing

Make sure appraisal has been ordered	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Follow-up with Lender for appraisal results	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Monitor underwriting process through communication with Lender	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Inform Cooperating Agent of appraisal status	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Appraisal results: At Value with Lender Required repairs - Follow up with the cooperating agent for repairs and schedule/confirm re-inspection	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Title Company

Acquire existing survey and title policy	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ensure all documentation plus contacts are provided within the contract time frames	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Remain in contact throughout the transaction	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Confirm Survey/Elevation Certificate ordered and delivered to appropriate parties	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Deliver title commitment to Buyer	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Closing

Disbursement authorization is provided to the title company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ensure delivery of lender closing documents to title company	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Track preparation of the preliminary settlement statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ensure Broker has received all closing documents required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Coordination of closing time and date with all involved parties - if mail out, providing title address and time for mobile notary	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Schedule final walkthrough	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Request Review/Testimonial at Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Communication

Weekly Milestone email to Agent	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Copied on all email communications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assigned Transaction Coordinator to account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calendar invitations on milestone dates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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TRANSACTION COORDINATING