

Released and Recorded's Transaction Management Service Menu



Full Service Transaction Management

CONTRACT TO CLOSE ASSISTANCE FOR YOU AND YOUR CLIENTELE

Fee: **\$425.00**

UPON MUTUAL RELEASED AND RECORDED WILL PROVIDE THE FOLLOWING SERVICES:

Draft Transaction Coversheet for agent's approval.

Send an introductory email introducing **Released and Recorded** as the agent's personal transaction coordinator while also providing a timeline of deadlines with a copy of the executed contract to coop-agent, escrow and title.

Send an introductory email introducing **Released and Recorded** as the agent's personal transaction coordinator to the Lender (IF APPLICABLE) providing the PSA with the form 17 removed.

Send an introductory email to the agent's clients introducing Released and Recorded as the agent's personal transaction coordinator while also providing a timeline of deadlines with a copy of the PSA.

Coordinate between the agent's clients and escrow to ensure a timely and stress-free deposit of earnest money (IF representing buyer)

Ensure PSA is fully executed with dates, initials, signatures, broker information, and addenda is completed.

Send disclosure packages if needed. (cannot gather signatures)

Released & Recorded
TRANSACTION MANAGEMENT

THROUGHOUT THE TRANSACTION RELEASED AND RECORDED WILL PROVIDE THE FOLLOWING SERVICES:

Send bi-weekly updates (Tuesdays and Fridays) to agent and agent's clients with an updated transaction timeline and a detailed description of next steps for the agent's clients

Check – in with lender and escrow continuously throughout the transaction to ensure all timelines are met and the transaction runs smoothly

Submit all required contract documents including addenda, and coversheet to agent's office

Ensure the lender, title company, and broker receive any amendments or changes to the contract

Verify Earnest Money deposit, obtain receipt from escrow, and submit to agent's office

Monitor appraisal timeline and completion with the lender

Ensure your buyer/seller is provided a copy of all documents

Verify inspection date and time

Confirm inspection has been set up in accordance with the offer deadline

Update deadlines due to any changes in the contract

Order Home Warranty per contract – if needed

Order HOA documents – if needed

Remind agent to approve Commission Disbursement

Remind agent to approve Estimated Settlement Statement

72hr and 24 hour in advance email/text reminders of contractual due dates to agent

Verify escrow has all required documentation for closing

Coordinate and confirm final walk-through

Confirm signing appointment for agent's client

Conduct a final audit of the file 7 days prior to closing to ensure all documents are uploaded and the file is complete

Check-In with Agent 7 days prior to closing to confirm deadline

Confirm final recording and alert agents

Follow-Up with agent to obtain if any outstanding documents, material correspondence

Send email to your client asking for a review on Zillow or your preferred site



Office Compliance + Timeline Reminders

Fee: \$310.00



UPON MUTUAL RELEASED AND RECORDED WILL PROVIDE THE FOLLOWING SERVICES:

Draft Transaction Coversheet for office submittal

Send an introductory email to the agent providing a transaction summary including a timeline of deadlines, any notes from initial audit, and all contacts involved with the transaction (Lender, Escrow, Title, etc)

Ensure everything is fully executed with dates, initials, signatures, broker information is completed

Submit all required contract documents including coversheet (upon agent approval) to office for compliance

Agent 24 hour in advance email/text reminders of contractual due dates

Verify EM deposit and obtain receipt from escrow

Update deadlines due to any changes in the contract

Remind agent to approve Commission Disbursement

Forward all disclosures, documents, and reports to office throughout the transaction timeline.

Conduct a final audit of the file 7 days prior to closing to ensure all documents are submitted to the office and the file is complete

Check-In with Agent 7 days prior to closing to confirm closing deadline Confirm final recording and alert agent

Forward Final Settlement Statement to office upon closing

Follow-Up with agent to obtain outstanding documents (if applicable)

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