

## Hometown Transaction Coordinators Rate Sheet & Task List

Single Side | Dual Side

**SILVER  
STEWARD**  
\$295.00 | \$495.00

**GOLD  
STANDARD**  
\$395.00 | \$595.00

**PLATINUM  
CONCIERGE**  
\$495.00 | \$695.00

### Broker/Office Requirements

✓ Review Uploaded Documents for 10 Point QC Review and confirm Ratification	✓	✓	✓
✓ Upload all contract documents into office compliance system	✓	✓	✓
✓ Complete required disclosure forms and internal documents required by Broker	✓	✓	✓
✓ Request Disbursement Authorization	✓	✓	✓
✓ Deliver Disbursement Authorization to Settlement Agent	✓	✓	✓

### Contract

✓ Review and compute contractual deadlines	✓	✓	✓
✓ Contact Stakeholders involved in the transaction (escrow, title, lender, cooperating agent), draft welcome letter and provide working timeline with action items	✓	✓	✓
✓ Confirm escrow deposit	✓	✓	✓
✓ Request Escrow Instructions from Escrow Agent - Confirm Buyer Receipt		✓	✓
✓ Provide welcome letter to Buyer and/or Seller. Introduce ourselves as a member of your team by text or e-mail		✓	✓
✓ Extensions/Addenda - draft document, obtain approval from licensee and circulate/track signatures, deliver to all applicable parties executed document		✓	✓

### Condominiums & Homeowners Association

✓ Obtain copies of governing documents as dictated by purchase agreement and/or rider	✓	✓	✓
✓ Verify status weekly with association until receipt of certificate of approval and/or denial	✓	✓	✓
✓ Confirm receipt of approval by the title company	✓	✓	✓
✓ Obtain signed receipt from buyer		✓	✓
✓ Ensure buyer has received resale application from seller and applied.		✓	✓
✓ Review Application and its process with Buyer			✓

### Inspections

✓ Schedule/Confirm inspections for both home and termite within the time frame of contract and inform all involved parties		✓	✓
✓ Follow-up with Listing Agent/Seller to confirm repair status and receive "items of satisfaction" to close out task		✓	✓
✓ Receive Executed Repair or Credit Addendum from Licensee and/or Attorney deliver to appropriate parties	✓		

### Insurance

✓ Schedule/Confirm all insurance inspections. For example: 4-point, Roof, and Wind		✓	✓
✓ Obtain Quotes from Preferred Insurance Vendors (Licensee to provide Vendors)			✓
✓ Provide Received Quotes to Buyer and Lender for review and consideration			✓
✓ Follow-up to confirm Insurance is bound			✓

### Financing

✓ Confirm buyer has made application	✓	✓	✓
✓ Make sure appraisal has been ordered	✓	✓	✓
✓ Confirm Lender Questionnaire for Condominium Approval (as required)	✓	✓	✓
✓ Follow-up with lender for appraisal results	✓	✓	✓
✓ Monitor underwriting process through receipt of loan approval followed by the clear to close	✓	✓	✓
✓ Appraisal Results: At Value w/ Work Order - follow-up with seller for required repairs, schedule/confirm re-inspection		✓	✓

### Title Company

✓ Acquire existing survey and title policy (if they exist and are still valid)	✓	✓	✓
✓ Ensure all documentation plus contacts are provided within contract time frames	✓	✓	✓
✓ Remain in weekly contact throughout transaction	✓	✓	✓
✓ Confirm Survey/Flood Cert ordered and delivered to appropriate parties	✓	✓	✓
✓ Monitor Title Cure Request and removal from title commitment	✓	✓	✓

✓ Deliver title commitment to Buyer for walk through with Title Agent		✓	✓
✓ Deliver Lien Search and Estoppel to the Buyer for review.		✓	✓

#### Closing

✓ Disbursement authorization is provided to the title company	✓	✓	✓
✓ Ensure delivery of lender closing documents to Title Company	✓	✓	✓
✓ Track preparation of the HUD and provide to Licensee for review and approval	✓	✓	✓
✓ Ensure Broker has received all closing documents required	✓	✓	✓
✓ Request wire instructions to be delivered to the Buyer or Seller to Title		✓	✓
✓ Coordination of closing time and date with all involved parties – if mail away,		✓	✓
✓ Schedule final walk-through		✓	✓
✓ Confirm receipt by buyer of final amount due at closing		✓	✓
✓ Confirm receipt by seller of proceeds figure		✓	✓

#### Communication

✓ Property Timeline Webpage with Email Reminders	✓	✓	✓
✓ Weekly Milestone e-Mail to Agent (Thursday)	✓	✓	✓
✓ Copied on all eMail Communications	✓	✓	✓
✓ Provide Listing Agent with MLS Credentials to close out MLS when representing the Buyer	✓	✓	✓
✓ Assigned Transaction Coordinator to Account		✓	✓
✓ Private Chat Group/Text Message thread with Buyer/Seller & Licensee		✓	✓
✓ Auto Text Reminder: Contingency Expiration (24 Hour Prior) to Agent		✓	✓
✓ Standard Video Introduction to Seller and Buyer		✓	
✓ Request Review/Testimonial at Closing		✓	
✓ Personalized: Branded to Agent Video Introduction with Branded Signature and Agent Color Palette			✓
✓ 15 Minute - Teleconference or Zoom contract review/onboarding call with Buyer/Seller/Agent - 24 Hours After Intro Video/Email sent.			✓
✓ 2X Testimonial Request (Closing and 7 Days Post-Closing)			✓

#### Program Disclosure

the Licensee/Hiring Agent acknowledges and accepts the following: (1) the Coordinator is a shared service providers who operates with a time-block schedule (2) is an unlicensed assistant who complies with the latest guidelines for Unlicensed Assistant in the state (3) The Coordinator is available Monday-Friday 9:30 AM to 6 PM via "Slack", text or email. (4) The Realtor may schedule a teleconference with the Coordinator through the Client Success Department (5) The scope of the Coordinators communication with the Buyer or Seller is directly related to the package chosen:

**Silver Steward:** Out of 100 task the Licensee is responsible for 4 +1 = the Licensee will communicate with client(s) and provide all updates, schedule inspections, draft the wins (addenda and/or extensions) and review/approve FINAL HUD/ALTA for closing. Coordinator will communicate with licensed professionals (i.e. lender, loan officer, escrow agent, title agent, property manager et. al), copy the Licensee in all correspondence, provide weekly milestone update, and complete brokerage compliance requirements.

**Gold Standard:** Out of 100 task the Licensee is responsible for 3 +1 = the Licensee will communicate with client(s), provide in writing the language for the win's (extensions/addenda) for the Coordinator to draft, and review/approve all documents including FINAL HUD/ALTA for closing. Coordinator will communicate with licensed professionals (i.e. lender, loan officer, escrow agent, title agent, property manager et. al), Buyer/Seller via text or email, copy the Licensee in all correspondence, provide weekly milestone update, and complete brokerage compliance requirements.

**Platinum Concierge:** Out of 100 task the Licensee is responsible for 3 +1 = the Licensee will communicate with client(s), provide in writing the language for the win's (extensions/addenda) for the Coordinator to draft, and review/approve all documents including FINAL HUD/ALTA for closing. Coordinator will communicate with licensed professionals (i.e. lender, loan officer, escrow agent, title agent, property manager et. al), Buyer and/or Seller via text, or email, copy the Licensee in all correspondence, provide weekly milestone update, and complete brokerage compliance requirements.

\*\*\* Initial set-up of Platinum Concierge branded marketing collateral: templates, videos, and teleconference room will take 24 hours from 1st submission. Client onboarding 15 minute video chat or call will be scheduled by Coordinator within 1 business day of introduction email - no same/day onboarding calls available. \*\*\*

