

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.

DATE: _____, 20____. Prepared by _____.

FACTS:

Property address _____

Buyer's agent _____ CalBRE # _____

Purchase price \$ _____,

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

Property data: Seller occupied, Tenant, Vacant,

SFR, Condo, Two-to-four units,

HOA, Property is in foreclosure,

NOD recorded _____, 20____,

short sale, estate sale, court approval required.

Buyer's name _____

Mailing address _____

Phone _____, Cell _____,

Email _____

Seller's name _____

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

Check Items Needed	Outside Reports/Docs		Internal Reports/Docs		Itemized Purchase and Closing Activities:
	Date Ordered/Requested	Date Received	Date Sent	Date 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 Items Needed	Outside Reports/Docs		Internal Reports/Docs		Itemized Purchase and Closing Activities:
	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.

- Right to Enter and Exhibit Unit to Buyers [RPI Form 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]