WRT SOLUTIONS

WINDERMERE REALTY TRUST

TRANSACTION COORDINATION

Our goal is to save you valuable time by managing all of your transaction details so that you can stay focused on your clients.

Imagine what you could do with the extra 8-10 hours of time you'll gain on every sale!

We're flexible, too. Use our team during your busy season or on every transaction.

We have years of experience with real estate transactions and Windermere Realty Trust systems and tools; we're ready to provide you with exceptional concierge service for your transactions.

From paperwork to timelines, drafting addenda, and more, we've got you covered.

TC SOLUTIONS CONCIERGE SERVICE

Complete Transaction Coordination from mutual acceptance through closing.

You handle the licensed duties, we'll handle the rest!

WINDERMERE
REALTY TRUST

WRT TRANSACTION SERVICES FOR AGENTS

CURRENT SERVICES — Complimentary

- Set up file in Paperless Pipeline
- Send Commission Demand to Escrow
- Send to Reviewing Broker
- Input transaction into Lone Wolf - our accounting program
- Assign any additional paperwork uploaded by agent
- Update any changes in file such as commission, close date, sale price
- Send any changes to escrow
- Upload closing statement
- Close out file in both Paperless Pipeline & Lone Wolf

BUYER TRANSACTION SERVICES — $400

- Complete Transaction Memo including note in Special Instructions field noting the TC/Fee
- Upload all Documents & Transaction Memo to Paperless Pipeline
- Complete Transaction Timeline and send to client/lender/escrow/co-op agent
- Once agent has e-troduced the TC to the clients, lender, escrow and co-op agent, send an introduction email and timeline to clients
- Send all documents to co-op agent, escrow, and lender including the sale agreement, any counter offers. Include client contact information for escrow
- Request SPD, LBP Addendum & HOA docs if applicable from co-op agent
- Insert contingency deadlines into Outlook calendar and/or send a Text Reminder to the agent 24 hours in advance of each contingency
- Confirm inspection dates/times with agent; add to Outlook calendar & Transaction Timeline
- Confirm that SPD & HOA Docs have been OK'd by the agent to send to the buyer (if applicable)
- Inform co-op agent of inspection dates/times; obtain access instructions (if necessary)
- Send "Next Steps" email to clients including updated Transaction Timeline, Seller's Property Disclosures & HOA Docs (or link to portal/if applicable)
- Arrange EM pickup/drop off by deadline & ensure receipt is delivered to all parties
- Confirm with agent that SPD & LBP Addendum are OK to request signature from buyer
- Confirm with agent that HOA Docs have been reviewed and are OK to request signature from buyers (if applicable)
- Send Preliminary Title Report to buyers (all questions are directed to agent)
- Follow-up on appraisal order/status with lender (check-in weekly)
- Obtain access instructions for any post-inspection vendor appointments that agent has scheduled
- Add any agent-scheduled vendor appointments to Outlook Calendar and communicate with client & Co-op Agent
- Order Home Warranty (if applicable); confirm receipt with title and Co-Op Agent (if seller-paid)
- Order utility list from escrow
- Review active files with agent every Monday via telephone or email
- Send update email to agent including details on all current transactions on Tuesday
- Send update email to all parties on Tuesdays, including updated Transaction Timeline
- Confirm that buyers have received their closing disclosure (CD), if applicable
- Send "Preparing for Closing" email to buyers, including utility list
- Confirm that agent has reviewed final Transaction Memo; make any revisions & upload to Pipeline
- Confirm that agent has reviewed Estimated Settlement Statement; then send to buyers
- Schedule final walk-through with buyers and co-op agent, add to Outlook calendar (if applicable)
- Schedule signing appointment, add to Outlook calendar
- Provide agent with Zip File of all transaction documents
- Send final thank you email to client(s) and ask for a testimonial (OPTIONAL)
- Send thank you card(s) to lender, escrow and co-op agent (OPTIONAL)

LISTING SERVICES - PRE-LISTING $125

- Prepare CMA (comps provided by agent)
- Create listing transaction in SkySlope Forms
- Prepare all necessary listing forms and listing agreements
- Order TRIO
- Confirm school district & schools
- Check previous RMLS listing & tax records
- Check DEQ LUST website for any record of oil tank
- Check permit status for any open or pending permits
- Start listing input in RMLS/CMLS
- Order sign install
- Insert listing description provided by agent to RMLS
- Send Seller's Disclosures to client to fill out
- Upload disclosures & contract preparation on docs to SkySlope Forms
- Upload photos to RMLS/CMLS
- Upload Matterport/Virtual tour in RMLS/CMLS
- HOA/Condo docs upload to RMLS/CMLS
- Home Energy score upload to RMLS
- Send RMLS/CMLS printout & flyer along with any additional docs to be signed
- Publish once approved by agent in RMLS/CMLS
- Turn in all paperwork to Paperless Pipeline & make sure file is complete
- Premier Listing registration/paperwork (if applicable)
- Schedule WRT Connect Tour - Thursdays
- Schedule Broker tour in RMLS/CMLS -Tuesdays
- Schedule Open House in RMLS/CMLS if needed
- Draft any addendums, price changes, extensions and send for signatures (with agent approval)
- Send "What's Next?" email to clients

LISTING SALE TRANSACTION SERVICES $400

- Send rejected offers to sellers for signature via DigiSign (if applicable)
- Complete Transaction Memo including a note in Special Instructions field noting the TC/Fee
- Upload all documents & Transaction Memo to Paperless Pipeline
- Create Transaction Timeline for client/lender/escrow/co-op agent
- Once the agent has e-troduced the TC to the clients, lender, escrow and co-op agent, send an introduction email to clients
- Open escrow: email all documents including sale agreement, any counteroffers, pre-approval letter, lender and client contact information
- Insert calendar deadlines into Outlook calendar and/or send a Text Reminder 24 hours in advance of each contingency
- Confirm EM is received by the deadline; send receipt to sellers
- Provide any additional disclosures to Buyer's Agent (Siding, Woodstove, etc.)
- Request any additional HOA docs and provide them to buyers by the deadline (if applicable)
- Collect signatures on SPD & LBP
- Track delivery of title report and confirm receipt by sellers (all questions directed to agent)
- Track HOA doc receipt and timeline (if applicable)
- Follow-up on appraisal order/status with lender (if applicable)
- Follow-up on buyer's signatures on all disclosures/addenda; update Transaction Timeline
- Review active files with the agent every Monday via telephone or email
- Send update email to agent including details on all current transactions on Tuesdays
- Send update email to all parties on Tuesdays, including updated Transaction Timeline
- Send "Preparing for Closing" email to sellers (including a reminder about utilities remaining in place until buyer possession date/time)
- Confirm that buyers have received their closing disclosure
- Confirm that agent has reviewed final Transaction Memo; make any revisions & submit to Pipeline
- Confirm that agent has reviewed Estimated Settlement Statement; then send to sellers
- Schedule signing appointment; insert the date on Outlook calendar
- Schedule final walk through; insert the date on Outlook calendar (if applicable)
- Order sign removal; insert the date on Outlook calendar and inform Buyer's Agent
- Provide agent with a Zip File of all transaction documents
- Send final thank you email to client(s) and ask for a testimonial (OPTIONAL)
- Send thank you card(s) to lender, escrow, and co-op agent (OPTIONAL)

DUAL REPRESENTATION - BUYER & SELLER $100 add on

GET STARTED!

1 **Schedule a Short Orientation Call with our Team**
TCSolutions@windermere.com
971-235-7093

2 **Provide Login Credentials via Telephone**
Your passwords will be securely stored in Lastpass.com

3 **Complete Form for Your First Transaction**

4 **Schedule a Weekly Check-In Time with your TC**

MEET YOUR TRANSACTION COORDINATION TEAM

ANNETTE WESTMORELAND

Lead Transaction Coordinator
971-235-7093
awestmoreland@windermere.com

KIMBERLEE KAUL

Transaction Coordinator
503-338-8681
kimberleekaul@windermere.com

GEORGIA SMITH

Transaction Coordinator
503-730-4430
gsmith@windermere.com

WE'LL HANDLE (ALMOST) EVERYTHING

A few exceptions:

- Inform co-op agents of termination
- Send addenda to co-op agent without verbal or written consent
- Respond to lender or escrow questions (outside of timeline clarifications)
- Submit offers to co-op agents
- Arrange property showings
- Locate/contact vendors for repairs
- Schedule inspections
- Attend on-site vendor and/or client appointments
- Respond to client questions regarding contracts, disclosures, title report, etc.
- Respond to co-op agent questions regarding contracts, disclosures, etc.

Thank you!

We look forward to working with you!