

Transaction Service Level and Fees
Single Side / Double Side

A+ **A++** **A+++**
Compliance Standard Concierge
\$300/\$450 \$350/\$500 \$450/\$600

Review offer documents for accurate dates, initials, signatures, and other information.	+	+	+
Add participants to the file including buyer, seller, agents, title, lender, HOA, inspector(s), assistants, etc. with contact info.	+	+	+
Confirm loan origination/pre-approval or proof of funds.	+	+	+
Confirm that all necessary addendums, riders, and disclosures (Seller's property disclosure, HOA, Condominiums, LBP, etc.) are included, completed, and returned to LA.	+	+	+
Confirm that all broker-required internal documents have been completed and signed.	+	+	+
Create sale file and upload all documents in your document management system.	+	+	+
Calculate deadlines per the contract (effective date, escrow, inspection, loan origination and approval period, appraisal, closing date, etc.).	+	+	+
Introduction emails sent to all parties (title, lender, client, and co-op agent) with transaction summary, important deadlines, and copy of fully executed contract and any necessary addenda.	+	+	+
Request wire instructions for escrow deposit and confirm receipt.		+	+
Email insurance reminder to buyer (when representing).		+	+
Verify escrow deposit(s) and obtain EMD receipt. Send to LA.	+	+	+
Schedule and confirm inspections per buyer and licensee's choice of inspector, insurance requirement, and per the inspection deadline in the contract.		+	+
Request insurance quotes from client's vendor list and provide to buyer and lender.			+
If a condominium, request declaration, articles, bylaws and rules, financials, FAQ's, and, if necessary, application for approval.	+	+	+
If HOA, request community and/or HOA documents.	+	+	+
Confirm appraisal order and appraiser information with lender.			+
Follow up on inspections and appraisals	+	+	+
Prepare addenda documents as needed, send for signatures once reviewed and approved, follow up with co-op agent until fully executed.		+	+
Weekly check-ins with lender throughout the transaction, especially watching loan approval deadline and clear to close.		+	+
Confirm title insurance as per the contract.		+	+
Weekly check-ins with title throughout the transaction.	+	+	+
Send status emails to agent/client throughout the transaction.	+	+	+
Confirm full compliance per broker's requirements 7-10 days prior to close.	+	+	+
Confirm that the disbursement authorization and lender package have been received by title.	+	+	+
Verify that the preliminary ALTA has been sent for approval.	+	+	+
Establish the method of closing and schedule date and time accordingly.		+	+
Schedule final walk-through and confirm closing details with agent and Title.		+	+
Confirm agent's preferred commission payment method (SDP, check at close, wired to account, etc.) with agent and Title.	+	+	+
Upload Final ALTA and any other required documents to the broker's document management system for compliance.	+	+	+
Post-closing follow-up including CRM update, agent-provided card to buyer/seller, and review request.			+
Up to two (2) hours of additional administrative time for phone calls, concierge client assistance, etc.			+