**NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PHONE NUMBER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**E-MAIL: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PROPERTY ADDRESS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**PRELIMINARY MEETING in LOFTY AND DOCUMENTS IN DOTLOOP:**

* Add Client into **Lofty**
* Create Transaction in Lofty pre-contract
* Send transaction to Dotloop to get Dotloop Required Forms
* Information About Brokerage Services (IABS)
* Buyer Representation Agreement (TXR 2501)

**INITIAL SET-UP & NEXT STEPS:**

* Set-up Client Folder on PC
* Set-up home Searches in Matrix
* Schedule showing appointments (Showing Smart)
* Print Disclosure Documents prior to showings (i.e. Seller’s Disclosure, Flood Map, Quick CMA comps, etc.)

**DOCUMENTS NEEDED:**

* General Information and Notice to Buyer (TXR 1506)
* Wire Fraud Notice (TXR 2517)
* Tax Record
* 1-4 Family Residential Contract (TXR 1601/1701) AND ASK AGENT THE FOLLOWING QUESTIONS
  + Survey – does client have workable property survey document
  + Seller’s Preferred Title Company
  + Preferred Closing Date
  + Exclusions and Negotiable Items – identify and written into contract
* 3rd Party Financing Addendum
* HOA (Addendum for Property Subject to Mandatory Membership in a Property Owners Assoc.), if applicable and if NOT using the one listing agent provides
* Seller’s Disclosure (to be signed by Buyer)
* Lead Based Paint (only if home was built prior to 1978)
* Non-Realty Addendum (if there will be conveyances such as Appliances)
* Addendum for Right to Terminate (Conventional loans only)
* Get updated Lender letter with property address and contract amount
* Buyer Walk-through and Acceptance Form (TXR 1925)
* Add settlement statement to Dotloop (from title company)

**OPTION PERIOD STEPS:**

* Earnest Money – deliver to Title Company, made to Title Company
* Option Fee Check – deliver to Title Company, made to Title Company (Add receipt to Dotloop)
* Make sure lender has copy of 1-4 Contract, Third Party Financing and HOA Addendum
* Put all signed and executed documents into **Lofty Transaction/Dotloop**
* Obtain Inspection Report – negotiate repairs and amendments
* Choose Home Warranty – right after inspection if not already set-up
* Remind Buyer to get Homeowner’s Insurance

**APPRAISAL & CLOSINGNEXT STEPS:**

* Confirm Appraisal has been ordered and received
* Provide Buyer with Support for transition of home services:
  + Reliant Energy Concierge – can help with full set-up
  + Other services including Comcast Reward Program and ADT Home Security
* DA generated in **Dotloop** by preparing LPT Commissions Intake Form
* Request Closing Time and Date after consulting Buyer and securing with Title Company
* Verify Closing Disclosure (CD) has been signed (at least 3 days before closing from Lender)
* Verify Closing Procedures with Title Company – Title Co. to provide ahead of closing
* Thank You Note – bring to closing (suggest hand written)
* “Just Sold” Cards – sent to neighborhood

**POST CLOSING:**

* Update client home address in Lofty
* Send Christmas Ornament
* Remind Client to change license to apply for Homestead Exemption
* Send copy of Closing Disclosure for Taxes - in February
* Reminder of Property Tax Assessment services – reminder in March
* Anniversary CMA – send message on 1 year anniversary of closing