



True North Transaction Management Services

DO YOU FIND YOURSELF.....

1. Missing new client opportunities?
2. Spending too much time working in your business?
3. Missing family time and events?
4. Stressed out with the “busy work” of your transactions?

IF SO, CONSIDER HIRING A TRANSACTION MANAGER SO YOU CAN.....

1. Focus on money generating tasks!
2. Increase your lead generation activities!
3. Get quality time back with your loved ones!
4. Enjoy your profession!
5. Watch your business grow!

CHOOSE YOUR PACKAGE.....Or customize YOUR own!!

1. **Audit Compliance** – Just the basics to keep you compliant.
2. **All-Inclusive** – Audit Compliance PLUS ALL the paperwork, coordinating with all parties, deadline management and MORE!!

ADDITIONAL SERVICES -Can be in addition to, or stand-alone and are subject to availability.

- **Prep an Offer**– parameters must be provided in writing to TM to ensure accuracy. Price is per contract and includes any changes due to negotiations.
- **Listing Docs** – parameters must be provided in writing to TM to ensure accuracy. Price is per contract and includes any changes.
- **Misc. items per request**

YOUR TM MEETS THE FOLLOWING.....

- 7 years as a licensed LOCAL REALTOR
- Full-time experienced Transaction Manager
- Non-Disclosure agreement to ensure you and your clients’ information is protected
- Proficient in Dotloop, Skyslope , Command, Brokermint and DocuSign
- Private E&O insurance protected

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Audit Compliance Package - \$250.00

- Set up transaction folders in Dotloop/preferred site
- Maintain and organize Agents dotloop/preferred site ensuring all required docs are included and compliant
- Ensure all audit documents are complete, signed, initialed and meet audit compliance
- Work Pending audit sheet to ensure all requirements are completed
- Work with office admin to finalize file audit compliance
- Ensure DA/CDA Issued (if applicable)

Stand Alone Or Add On Services

- Listing Docs Preparation \$50
To include any changes required
- Contract Offer Doc Preparation \$50
To include any changes required during negotiation

Additional Items per request – Inquire

ALL-INCLUSIVE Management Package - \$350.00

- All of items in Audit Compliance Package PLUS:
- Prep Listings AND Offer docs and send for signatures upon approval.
- Create and maintain contract deadline calendar and send reminders to all parties.
- Ensure that lender/title receive contract and have initiated loan process to include ordering of appraisal.
- Ensure home warranty ordered if applicable
- Write TRR form per agent specifications and obtain all initials and signatures required.
- Obtain repair receipts, upload them to Agent site and send copies to buyer/agent.
- Write supplementals per agents request, ensure signatures are completed and doc sent to all parties.
- Send Utility reminders prior to closing.
- Communicate with all parties throughout transaction to ensure timely close.
- Request reviews from client after close.
- Set up “After the Close” agent check-ins.
- Upload closing docs to agents preferred site.



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AFTER-HOURS ALL-INCLUSIVE Management Package - \$400

After Hours Package Details:

- All of items in All-Inclusive package PLUS:
- Extended hours on Monday thru Friday from 5:30pm-8pm
- Saturday availability 11am-7pm
- Sunday 12pm-7pm
- After hours is not available with the Audit compliance only package.
- May change plans 2x's in 12-month period.

***Important ONE time assist for Agents signed up with All-Inclusive Package!**

- If you do NOT need after-hours services on a regular basis but DO need occasional assistance with offer writing after hours you can use the after-hours service for offer writing for \$20.
- This fee will be invoiced the Friday after the request.
- Please note there is NO Charge for offer writing during our regular hours as this is a regular service for the Standard All-Inclusive package.