



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 - \$200.00

- Set up transaction folders in Dotloop/preferred site
- Maintain and organize Agents dotloop/preferred site ensuring all required docs are included and compliant
- Prep Processing Sheets
- Ensure all audit documents are complete, signed, initialed and meet audit compliance
- Send Processing sheet and Contract docs to Admin
- Work Pending audit sheet to ensure all requirements are completed
- Work with office admin to finalize file audit compliance
- Ensure Accounting receives completed audit form

Stand Alone Or Add On Services

- Listing Docs Preparation \$25
To include any changes required
- Contract Offer Doc Preparation \$40
To include any changes required during negotiation

Additional Items per request – Inquire

ALL-INCLUSIVE Management Package - \$300.00

- All of items in Audit Compliance Package PLUS:
- 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.
- Provide termite DDOF to lender as needed.
- Ensure that repairs were complete, obtain repair receipts, upload to Dotloop/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 a timely close
- Request reviews from client after close.
- Set up “After the Close” agent check-ins.
- Upload closing docs to agents dotloop/site.