



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 TC to ensure accuracy. Price is per contract and includes any changes due to negotiations.
- **Listing Docs** – parameters must be provided in writing to TC 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 OKLAHOMA REALTOR (Currently Inactive)
- Full-time experienced Transaction Coordinator
- Non-Disclosure agreement to ensure you and your clients information is protected
- Proficient in Dotloop, Skyslope, Command, Brokermint, Transaction Desk and DocuSign
- Private E&O insurance protected

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True North Transaction Management

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Audit Compliance Package - \$250.00

- Set up transaction folders in agent 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 \$75 to include any changes required
- Contract Offer Doc Preparation \$75 to include any changes required during negotiation

Additional Items per request – Inquire

Contract Prep To Close ALL-INCLUSIVE Package - \$350.00

- All of items in Audit Compliance Package PLUS:
- Prep 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 per agent specifications and obtain all initials and signatures required.
- Obtain repair receipts, upload them to Agent site and send copies to buyer.
- 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 the 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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Listing Prep To Close ALL-INCLUSIVE Package - \$425.00

- All of items in Audit Compliance Package PLUS:
- Prep Listing AND Offer docs and send for signatures upon approval.
- Ensure listing docs kept up to date and notify agent of need for re-list and prep re-list docs as needed
- 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.
- Write TRR 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 the transaction to ensure timely close.
- Request reviews from client after close

AFTER-HOURS ALL-INCLUSIVE Packages - \$400 Contract To Close or \$475 for Listing To Close

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

After hours offer prep available to all Agents utilizing All-Inclusive packages for \$25/each request

** after hours offer writing is included in the After-hours packages