mycoordinator

REAL PEOPLE, REAL RESULTS

USERNAME: ______________________ PASSWORD: ______________________ PIN#: ____________

AGENT NAME: ______________________

Phone #: ______________________

Email: ______________________

License # ______________________

Birthday: ______________________

BROKERAGE: ______________________

Phone #: ______________________

Address: ______________________

____

Compliance Manager: ______________________

Email: ______________ Phone #: ____________

Where would I find your Brokerage Compliance Checklist? ________

____

Do you have any Brokerage specific forms? ____________

If Yes, List Document Names: ______________________

____

Where do we access blank contract docs? ____________

Website: ______________________

Username: ____________ Password: ____________

Does Broker issue DA for closing? ______________________

Will My Coordinator receive payment from DA or Title Company?

____

Does office/agent charge an additional Admin Fee to Clients? ______

If yes, how much is the fee? $ ______________________

MLS: Website: wfrmls.com - TC can NOT Access this

Username: N/A Password: N/A

PREFERRED TITLE CO: ______________________

Escrow Officer: ______________________

Email: ____________ Phone #: ____________

Assistant Name: ______________________

Email: ____________ Phone #: ____________

Office Address: ______________________

PREFERRED LENDER: ______________________

Loan Officer: ______________________

Email: ____________ Phone #: ____________

Assistant Name: ______________________

Email: ____________ Phone #: ____________

Office Address: ______________________

COMMISSION / GREENSHEET:

% Commission Split: ______________________

Are you capped on royalty? ______________________

Anniversary Date with Brokerage: ______________________

Donations & Amounts (if any)? ______________________

E&O Insurance: ______________________

BACK OFFICE: Website: ______________________

Username: ____________ Password: ____________

When do you submit file to Broker? ______________________

Submit updates throughout, or before closing? ____________

ADDITIONAL INFO:

Signature in emails to be listed as: "Transaction Coordinator for ______________________ " (Agent/Team Name)

How many files will you be starting with My Coordinator at the time of intake? ______________________

Estimated *total* file count for this year? ______________ Number of files closed last year? ______________

Do you want to be copied on all emails? ______________ Do not copy on? ______________

How is your earnest money handled? ______________________

Do you have your own email templates you would like me to use? ______________________

DATE OF REGISTRATION: ______________ ASSIGNED PROCESSOR: ______________

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REAL PEOPLE, REAL RESULTS

SECONDARY TITLE: ______

Escrow Officer: ______

Email: ______ Phone #: ______

Assistant Name: ______

Email: ______ Phone #: ______

Office Address: ______

SECONDARY LENDER: ______

Loan Officer: ______

Email: ______ Phone #: ______

Assistant Name: ______

Email: ______ Phone #: ______

Office Address: ______

SHOWING SERVICE: ______

Website: ______

Rep: ______

Email/Username: ______

Phone/Password: ______

Order Instructions: ______

SIGN INSTALL CO: ______

Website: ______

Rep: ______

Email/Username: ______

Phone/Password: ______

Order Instructions: ______

PHOTOGRAPHER: ______

Website: ______

Rep: ______

Email/Username: ______

Phone/Password: ______

Order Instructions: ______

HOME INSPECTION: ______

Website: ______

Rep: ______

Email/Username: ______

Phone/Password: ______

Order Instructions: ______

HOME WARRANTY: ______

Website: ______

Rep: ______

Email/Username: ______

Phone/Password: ______

Order Instructions: ______

ADDITIONAL NOTES: ______

DO YOU HAVE AN ASSISTANT? ______

Name: ______

Email: ______

Phone #: ______

What are their tasks? ______