



Agent / Manager Checklist

Agent Name:		Certification #:	Expiration Date:	Start Date:
Branch:				Submitted for Approval:
Mgr. Name:		Certification #:	Expiration Date:	Approved:
Property Address:		Submit all Paperwork to your Manager for Processing		
MLS ID:				

ACTION	AGENT RESPONSIBILITY PHASE 1 - APPROVAL SUBMISSION		YES	NO	Date
SIGN	Agent Commitment Agreement				
SIGN	Listing Agreement, Initial Agreement must be 180 days				
CONFIRM	Listing Agreement Provides a Commission of no less than 5% plus a 2% program fee				
RECEIVE	Open Pre-Sale Escrow and Obtain Preliminary Title Report, Inter County Title (CA), Ticolor (NV)	Check for any unforeseen liens			
OBTAIN	Client Pre-Qualified with Preferred Lender for Home Purchase				
OBTAIN	Lender Estimated Net Sheet with Down Payment Amount	Receive & Review Report			
COMPLETE	Summary Estimated Net Sheet	Must be sent with Application			
CONFIRM	Maximum CLTV 70%				
COMPLETE	Guaranteed Sale Client Agreement	Confirm All Required Signatures			
ORDER	Home and Pest Inspections. Other Inspections and Reports as Necessary or Appropriate	Receive & Review Report			
COMPLETE	Pricing Strategy Agreement	Agent & Seller Must Agree, Manager Must Approve			
COMPLETE	All normal Seller and Agent Disclosures				
RECEIVE	Repair Plan, if Necessary	Contractors must be licensed & reputable			
SUBMIT	To Manager: GS Packet, Agreements, Checklist, Estimates, Workplan & Reports	Include Application			
ACTION	MANAGER RESPONSIBILITY		YES	NO	Date
REVIEW	Manager Reviewed all Paperwork with Agent to Assure Completion	Verified Checklist Items for Accuracy			
REVIEW	Manager Inspected Home, CLTV %, Work Plan, Market Analysis and Pricing Strategy	CLTV Must be No More Than 70%			
OPINION	Manager provides their conditional approval subject to corporate approval				
SUBMIT	Manager Send All Completed Paperwork for Approval	Include Checklist, must be Complete and Organized.			
ACTION	CORPORATE RESPONSIBILITY		YES	NO	Date
REVIEW	Sign and Return if Approved or Provide Explanation if Declined for Reconsideration	Return to Manager and Agent			
COMPLETE	Deed of Trust and Straight Note Prepared				
SUBMIT	Sent to Manager and Agent Deed of Trust and Note for Signing and Recording				
ACTION	AGENT / MANAGER RESPONSIBILITY PHASE 2 - AFTER APPROVAL		YES	NO	Date
SIGN	Seller to Sign Deed of Trust, Notarized & Recorded with Local Clerk/Recorder Office	Original to Corp., Copy to Agent File and Client			
SIGN	Seller to Sign Straight Note	Original to Corp, Copy to Agent File and Client			
SUBMIT	Seller Check for \$1,000 Administration Fee Payable: Select Group Guaranteed Sale	Check to Corp., CHECK #			
TASK	Find your Client their New Home				
TASK	Upon opening escrow on the new home, put the GS home on the Market				
CONFIRM	Offer on GS Home May Be Accepted within Scope of GS Agreement With Client Approval	Must Be Above Net GS Sale Amount			
TASK	Work to try to line up the new home purchase and the GS home to close on the same day				