

Ultimate Transaction Coordinator Checklist

Master checklist with 50+ critical tasks for every real estate transaction from contract to close

✓ Checklist ✓ Process ✓ Organization

■ High Priority

■ Medium Priority

■ Recommended

5 Phases • 30 Days Average • Any State's Contracts

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Days 1–3

Phase 1: Contract Execution & Initial Setup

Critical foundation tasks that set the tone for the entire transaction.

Contract Processing

- Review executed contract for completeness and accuracy
- Verify all required signatures and initials are present
- Confirm contract ratification date and calculate all contingency deadlines
- Verify earnest money amount, deposit deadline, and delivery instructions
- Check for special stipulations, addenda, or unusual terms
- Upload fully executed contract to transaction management system
- Create transaction file with all party contact information

Communication Setup

- Send introduction email to all parties with timeline and next steps
- Confirm preferred communication method for each party
- Request lender contact info and pre-approval letter
- Contact title company to open title and confirm receipt of contract
- Verify MLS status is updated to pending or under contract
- Set up internal timeline with calendar reminders for every critical deadline

Pro Tip

Send a single 'welcome to the transaction' email within 24 hours of contract acceptance. Include the full timeline, all deadlines, and what you need from each party. This one email prevents 80% of the 'where are we?' questions you'll get over the next 30 days.

Days 4–10

Phase 2: Due Diligence Period

Inspections, appraisals, and buyer contingency management. Your busiest window.

Inspections

- Coordinate home inspection scheduling between inspector, buyer, and listing agent
- Confirm property access arrangements (lockbox code, occupied property scheduling)
- Follow up on inspection report delivery
- Track inspection objection deadline and ensure repair requests submitted on time
- Schedule specialty inspections if applicable (radon, mold, pest, sewer scope)
- Monitor repair negotiation responses and resulting addenda

Appraisal

- Confirm lender has ordered the appraisal
- Coordinate appraiser access to the property
- Track appraisal completion and follow up if delayed
- Review appraisal value against contract price — flag gaps early
- If appraisal comes in low, facilitate negotiation between buyer and seller

Title & HOA

- Verify title company received the contract and opened the file
- Follow up on title commitment / preliminary title report delivery
- Review title commitment for liens, encumbrances, or issues
- Order HOA documents if applicable (resale certificate, CC&Rs, financials)
- Track HOA document delivery and review timeline

Insurance

- Remind buyer to obtain homeowner's insurance quotes
- Confirm insurance binder provided to lender before closing

■ For flood zone properties, ensure flood insurance is quoted and bound

Pro Tip

Create a 'Day 3 check-in' habit. Three days into due diligence, confirm the inspection is scheduled, the appraisal is ordered, and title has everything they need. If any of those three aren't in motion, you're already behind.

Days 11–21

Phase 3: Financing & Documentation

Loan processing, document collection, and title work. The quiet phase where deals slip.

Loan Processing

- Confirm loan application is submitted with all required documentation
- Track loan processing milestones: underwriting review, conditional approval, clear to close
- Follow up on any underwriting conditions — missing docs delay closing by weeks
- Verify financing contingency deadline is met or extended
- Confirm interest rate lock status and expiration date

Document Management

- Collect and verify seller's property disclosure
- Confirm lead-based paint disclosure (pre-1978 homes)
- Collect HOA disclosures if applicable
- Verify natural hazard disclosures per state requirements
- Send wire fraud advisory to all parties
- Ensure all addenda are fully executed and filed
- Track any outstanding signatures or missing documents
- Prepare preliminary closing cost estimates for buyer review

Title Work

- Follow up on title search completion
- Coordinate resolution of any title issues (liens, judgments, boundary disputes)
- Confirm survey ordered if required by lender or contract
- Verify payoff information ordered for seller's existing mortgage
- Confirm title insurance commitment is issued

Pro Tip

Every Friday, send a brief status update to all parties: what's done, what's pending, and what's needed from whom. Agents love this because it keeps their clients informed without them having to do the work.

Days 22–28

Phase 4: Pre-Closing Preparations

Confirming everything is in place for a clean closing. No surprises.

Final Preparations

- Confirm clear-to-close from the lender
- Review closing disclosure (CD) for accuracy against contract terms
- Ensure buyer reviews CD within required 3-business-day window (TRID)
- Confirm closing date, time, and location with all parties
- Verify buyer has wired funds or obtained cashier's check
- Send wire fraud warning with verified wiring instructions — confirm by phone

Final Walkthrough

- Schedule final walkthrough 24–48 hours before closing
- Confirm all agreed-upon repairs are completed and documented
- Verify property condition matches contract terms
- Check that all systems and appliances are functioning
- Document any issues and communicate immediately to both agents

Closing Logistics

- Confirm all parties have valid government-issued ID
- Verify power of attorney documents approved by title company (if needed)
- Confirm moving arrangements and utility transfer coordination
- Prepare final document checklist for closing day
- Send closing day reminder: time, location, what to bring, parking info

Pro Tip

Call the title company the day before closing and ask: 'Is there anything that could prevent us from closing tomorrow?' That single call has saved more deals than any other habit in transaction coordination.

Days 29–30+

Phase 5: Closing & Post-Closing

Closing day execution and the post-closing follow-up that builds your business.

Closing Day

- Arrive early (or log in early) to review closing documents
- Verify all documents are correct and match contract terms
- Confirm all parties have signed where required
- Verify funds are received and disbursed correctly
- Obtain copies of all signed closing documents for your file
- Update MLS status to closed

Post-Closing (Days 1–14 After Close)

- Send closing confirmation to all parties
- Distribute copies of final closing documents to agents, buyers, and sellers
- Archive complete transaction file per brokerage retention requirements
- Submit commission disbursement authorization if applicable
- Send client gift or handwritten note on behalf of the agent
- Request review or testimonial from the agent
- Follow up on outstanding items: utility transfers, warranty, key delivery

Pro Tip

Your post-closing follow-up is your marketing. The TC who sends a clean, organized closing package to the agent within 48 hours — with a brief note about how the transaction went — is the TC who gets referred to the agent's colleagues.

From Checklist to Automated Workflow

This checklist works. But it still requires you to do the work manually. Every checkbox is a task you're completing by hand — opening the contract, reading the dates, typing them into your calendar, drafting the email.

DocJacket's AI reads your contract and builds your timeline automatically. You review and approve.

- ✓ **Upload a contract** — AI extracts all parties, dates, and terms
- ✓ **Timeline auto-builds** — Milestones and reminders set instantly
- ✓ **Communications drafted** — Intro emails with real names and dates
- ✓ **You stay in control** — Review, approve, move to the next deal

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This checklist is for informational purposes only. Adapt tasks to your state's requirements and brokerage policies.