

# Basic TC

**\$99/\$180**

(single/dbl side)

- Initiate and **maintain secure paperless** file with **Zipfile** to agent **at closing**
- **Broker compliance** through close
- **Agent Portal** for **24 hr access**

# Pro TC

**\$350/\$500**

(single/dbl side)

## Includes "Basic" plus:

- **Customized & branded Buyer/Seller Portal**
- Open **escrow**
- Act as **source of contact** for docs
- Create and send **customized, branded emails**
- **Prepare documents**, gather **signatures** (per state guidelines)
- **Weekly Updates** via text, email or portal
- **Templated, customized and branded emails** from you applied to any/every transaction
- **Lender follow ups** (Loan app, title, ins. binder, appraisal order/due, final underwriting, CD, Clear to close)
- **Email Final Settlement Stmt** to clients in January & **ask for referrals**
- Prepare/distribute **commission disbursement**
- Send Buyers/Sellers/Agent a **final .zip file** of documents
- **Request Buyer/Seller testimonial**
- **Material Communications (MC)**: Reminders for agent to prepare MC for compliance, upload Agent MC for compliance
- **Confirm recording**
- Automated **text reminders** for agent to check in with client 3-5 days post close
- More Customization!\*

# Premium TC

**\$450/\$600**

(single/dbl side)

## Includes "Basic & Pro" plus:

- **Calender sync** for important dates
- **Order Title, surveys, city/county utility & other docs**, as needed
- Order/manage **Home Warranties**,
- Manage **Condo or HOA transfers** with escrow, buyers & sellers
- Order or confirm **inspections**
- **Confirm repairs**, coordinate/gather **evidence of repairs** and distribute
- Upload **Inspection report/link** and other important links to portals
- Communicate with **multiple transaction teams** when sale is contingent
- Order/Request/Obtain **Propane measurement documentation**
- **Automated Text or email messages** for anything!
- Communicate and manage **referral documents**, add to **CRM**
- **Coordinate final walkthroughs**
- **Arrange notaries** and follow up
- Coordinate **signing** (or confirm) as requested by agent
- Organize and upload all forms to agent cloud storage
- **Order Buyer/Seller gifts**
- **Collect info from Co-op agent** or Seller to assist Buyers at **move in**
- Up to **4 Agent Templated "touch" emails** to Buyers/Sellers after closing
- Create a **branded social media** post with your chosen **testimonial** quote
- (Almost) **Unlimited customization\***

lodestar

*Transaction Coordination*

\*Most customizations included at no extra cost. Customizations are expected not to substantially increase workload for TC and must be agreed upon prior to work being started.