BUYER-SIDE COORDINATION / 01

MAP BUYER A AND PARTICIPANT ROLES

Use neutral labels. Keep names, addresses, account numbers, credentials, signatures and document contents outside.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Buyer A / role and communication preference only

Property A / neutral label only

Licensed agent role / no identity

Lender or financing role / no account details

Title, escrow or settlement role / label only

Attorney or other adviser role / if applicable

Preparation only. Not brokerage, mortgage, lending, credit, title, escrow, settlement, inspection, appraisal, insurance, tax, document, contract, legal or financial advice. Keep identities, addresses, accounts, access, signatures, credentials and document contents out.

BUYER-SIDE COORDINATION / 02

DEFINE MILESTONES AND HANDOFFS

Use placeholders until the appropriate participant confirms an actual date, document or required action.

Milestone A / item and confirming participant

Document Request A / requester, route and acknowledgment

Inspection or appraisal update / routing ownership

Financing, title or settlement update / routing ownership

Open-item escalation / recipient and response owner

Final review, walk-through, closing and post-close handoff

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BUYER-SIDE COORDINATION / 03

CHECK PROPOSAL READINESS

Tick what is organized. These checks do not confirm a date, term, document, obligation or closing action.

- [ ] Every coordinator receives the same Buyer A brief
- [ ] Private identities and transaction details stay out
- [ ] Participant roles are labeled
- [ ] Milestones identify who confirms actual dates
- [ ] Administrative tasks are separated from advice and decisions
- [ ] Document requests have routing and acknowledgment owners
- [ ] Open issues have an escalation recipient
- [ ] Closing and post-close handoffs are written

Open milestone, participant or confirmation question

Unassigned document-routing or escalation handoff

Missing final-review, closing or post-close scope detail

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BUYER-SIDE COORDINATION / 04

QUESTIONS FOR THE TRANSACTION COORDINATOR

Record the answer and where it appears in the proposal, workflow or service agreement.

Milestones: what is tracked and who confirms actual dates?

Roles: what do you own versus buyer or licensed professional?

Documents: how are requests routed, acknowledged and escalated?

Updates: how do inspection, financing and settlement items move?

Exceptions: what happens to late, inconsistent or out-of-scope items?

Close: what final-review, closing and post-close handoffs apply?

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BUYER-SIDE COORDINATION / 05

COMPARE THE SAME BUYER A BRIEF

Use Coordinator A and B. Clarify unlike task or authority assumptions before comparing proposals.

Coordinator A / B / proposal dates / shared Buyer A brief

Milestone tracking, participant and task ownership - A / B

Document routing, communication and escalation - A / B

Final review, closing, post-close handoff and exclusions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Transaction Coordination request. Share the same non-confidential Buyer A brief so participating pros can compete with proposals. Compare milestone tracking, task ownership, communication, escalation, document routing, closing handoffs, exclusions and fit. Private transaction records and confirmation by the appropriate licensed professionals may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. Private transaction records and confirmation by the appropriate licensed professionals may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/transaction-coordination/buyer-side-coordination

CFPB: Before, During and After the Mortgage Closing Process (official reference)

CFPB: Mortgage Closing Tools (official reference)

HUD: Buying a Home (official reference)

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