

CLOSING MANAGEMENT OVERVIEW

LEVELS OF CLOSING MANAGEMENT

Best Agent Business can handle a range of closing activities for our clients. The following is a brief overview of the type of services we offer, as well as those things we cannot do.

- **Weekly Closing Reports** – A weekly report is sent to you, based on information in your database. This involves very little time and is typically done for every Closing Management client.
- **Tracking & Top Producer Tracking** - Closings are entered and maintained in your database. Weekly Closing Reports are sent and used to keep information accurate, contract codes are updated and maintained as needed.
- **Closing Management** can involve any of the following tasks. It may also involve more than the tasks listed below.
 - ⇒ **Partial Closing Management** - Tracking plus a few of the closing tasks listed below. Partial Closing Management involves very little to no phone work and is mainly handled via email. Response time standard is within 24 hrs.
 - ⇒ **Full Closing Management** - Tracking plus most or all tasks listed below. Phone calls will be necessary at times. A high level of availability and quick response time is important.

CLOSING TASKS

- Maintain Closing Database such as Top Producer, SkySlope, Dotloop, etc.
- Send introduction email to closing parties.
- Complete office paperwork for the closing.
- Document Maintenance.
- Important Date Reminders.
- Sending documents to closing parties.
- Sending reminders to closing parties.
- Scheduling closing activities such as the inspection and the closing itself.
- Get signatures for documents either via email or DocuSign.
- Work hand in hand with closing parties to move the closing forward as needed.
- Handle urgent closing problems/issues as they arise.

Items Best Agent Business Closing Management Assistants CANNOT handle for Clients

- **Closing Management Services:** We cannot provide Closing Management Services for clients who do not use a system to track closings. Top Producer is our most commonly used closing system. If you are not sure if your closing system will qualify, ask us. We're more than happy to work with you.
- **Negotiable Items:** This can be difficult to determine but will include any unresolved issue relevant to the contract. All such issues will be referred to the client. The Closing Management Assistant will relay information ABOUT negotiable items but CANNOT participate in any decisions relating to them.
- **Drafting Documents:** Closing Management Assistants should not draft addenda or amendments to contracts. This work, in most states, should only be done by a licensed attorney in the state in which the document is being drafted. It is acceptable for the Closing Management Assistant to fill in information that has been provided by the client, but not to draft any wording.