



AGENT - PROPERTY TRANSACTION TRACKING

Property: _____ Date: _____

Agent: _____ Total Commiss/Fee _____ LCP Commiss/Fee _____

Listed for Sale ___ Listed for Lease ___ Listed for Sale/Lease ___ Listing Term _____ to _____ Not LCP Listed ___

Are You: Listing Agent ___ Selling Agent ___ Leasing Agent ___ Tenant Agent ___ Buyer Agent ___ Dual Agent ___

LISTING AGENT - REQUIRED Documents:

- ___ Working w/ RE Agents (Seller)
- ___ Listing Agreement
- ___ Property Report / GIS
- ___ Property Entered on KARNES
- ___ Sign Order Form Complete ___ No Sign Needed

Property Description _____

Additional Documents (If Applicable) _____

FINAL STATUS DATE:

___ **SOLD** ___ **LEASED** ___ **PENDING** ___ **WITHDRAWN**

___ Executed Lease Agreement ___ In Binder

___ Executed Purchase Agreement

___ Executed Closing Statement

___ Commission Submittal

Property MANAGED by LPM ___ YES ___ NO

___ **If YES**, Executed Prop. Mgmt. Agrmt. ___ In Binder

___ **If YES**, Evidence of Tenant Insur. Form ___ In Binder

COMMISSION

Co-Broke Agreeemt ___ Yes ___ No Referral ___ Y ___ N

Outside Broker _____

Brokerage: _____

Address: _____

___ List % ___ Sell/Lease % ___ LCP % ___ Agent %

___ Outside % ___ Referral %/Fee ___ Non-Listed %/Fee

___ Paid Upfront ___ Paid at Closing ___ Paid Over Term

Payout terms _____

Send Invoice(s) to _____

SELLING//LEASING AGENT - REQUIRED Documents:

- ___ Working w/ RE Agts _ Buyer _ Tenant _ Customer
- ___ Working w/ RE Agents (Seller/Lessor IF no agent)
- ___ Buyer/Tenant Agency Agreement (if applicable, N/A if not)

Additional Documents (If Applicable) _____

FINAL STATUS DATE:

___ **SOLD** ___ **LEASED** ___ **PENDING** ___ **CANCELLED**

___ Executed Lease Agreement ___ In Binder

___ Executed Purchase Agreement

___ Executed Closing Statement

___ Commission Submittal

Property MANAGED by LPM ___ YES ___ NO

___ **If YES**, Executed Prop. Mgmt. Agrmt. ___ In Binder

___ **If YES**, Evidence of Tenant Insur. Form ___ In Binder

COMMISSION

Co-Broke Agreeemt ___ Yes ___ No Referral ___ Y ___ N

Outside Broker _____

Brokerage: _____

Address: _____

___ List % ___ Sell/Lease % ___ LCP % ___ Agent %

___ Outside % ___ Referral %/Fee ___ Non-Listed %/Fee

___ Paid Upfront ___ Paid at Closing ___ Paid Over Term

Payout terms _____

Send Invoice(s) to _____

PROPERTY MARKETING Checklist

___ Added to Co Star ___ Added to Loopnet ___ Sign Ordered

___ Sign Placed on Property ___ File Placed in Cabinet



ACCOUNT REVIEW/Cover Sheet

AGENTS Complete:

Property: _____ Agent _____

LISTED/SOLD ___ LISTED/LEASED ___ NOT LISTED/SOLD ___ NOT LISTED/LEASED ___ LPM MANAGED ___ NOT MANAGED ___

OFFICE Complete: :

(Initial/Date on Completion)

File Review Sign-Off

All Agent Documents Submitted Date _____ Initials _____

SOLD or LEASED PROPERTY INFO Sheet Completed Date _____ Initials _____

Color-code Folder Placed in File Cabinet Date _____ Initials _____

Account Manager Sign-Off

Date _____ Initials _____

LPM LISTED Property

LEASED ___ SOLD ___

Agent Commissions Paid ___ Yes ___ No

___ Upfront ___ Over Term _____ Date Paid

Agent Referral Paid ___ Yes ___ No _____ Date Paid

Outside Broker: ___ Yes ___ No _____ Date Paid

Invoice Sent: ___ Yes ___ No _____ Date Sent

Payment Received: ___ Yes ___ No _____ Date Recvd

W-9 on file ___ Yes ___ No _____ Date Requestd

NON-LISTED Property

LEASED ___ SOLD ___

Agent Commissions Paid: ___ Yes ___ No

___ Upfront ___ Over Term _____ Date Paid

Agent Referral Paid ___ Yes ___ No _____ Date Paid

Invoice Sent: ___ Outside Broker ___ Owner _____ Date

Payment Received ___ Yes ___ No _____ Date Recvd

W-9 on file ___ Yes ___ No _____ Date Requestd

LPM MANAGED Property ___ YES ___ NO

Added to Appfolio ___ Date Added _____

Tenant Insurance Info Complete ___ Date _____

Placed in Binder ___ Date _____

Advertising Sign-Off

Status Updated on Marketing Website Date _____ Initials _____

Property Signs Removed Date _____ Initials _____



AGENT - Commission Submittal Form

Agent _____

Property Address _____

Closing/Leased Date _____

Total Commission Received _____ Date Received _____

Agent % _____ Agent Amount _____

LCP or LPM % _____ LCP or LPM Amount _____

Payout Terms _____

Outside Firm % _____ Outside Firm Name _____

Referral? _____ Referral % _____ Referral Firm _____

Outside/Referral Firm Payout Instructions (if any) _____

SOLD or LEASED?

SOLD _____ Closing Attorney _____

Attorney Address _____

LEASED _____ Executed Lease Attached _____ Property Managed by LPM _____

Property Mngmt Agreement Attached _____ Proof of Tenant Insurance Attached _____

Owner's Name _____

Owner Contact Info _____

Agent Signature _____

Approval Signature _____



AGENT - Sign Order Form

Property Address

Where to Place on Property

Date Needed _____

HEADING AREA (TYPE)

_____ FOR SALE _____ FOR LEASE _____ AVAILABLE _____ FOR SALE/LEASE

Note: Using the AVAILABLE header will allow for several headings to generate phone calls

SIGN SIZE

- | | |
|---|---|
| _____ 4' x 4' White Wood Posts (Banner) | _____ 4' x 8' White Wood Posts (Banner) |
| _____ 4' x 4' Banner (On Bldg) | _____ 4' x 8' Banner (On Bldg) |
| _____ 2' x 3' Black Metal Frame (In Ground) | _____ 18" x 24" Available (Window) |
| _____ 18" x 24" For Sale (Window) | _____ 18" x 24" For Lease (Window) |

Directions to Property

Extra Rider Needed on Sign
