

Norris & Stevens

INVESTMENT REAL ESTATE SERVICES

NON-MANAGED PROPERTY ROUTING SLIP

LANDLORD/SELLER _____

TENANT/BUYER _____

TRANSACTION NO. _____

AGENT(S) _____

RECEIVED BY	RESPONSIBILITIES	DATE	INITIALS
TRANSACTION COORDINATOR	Review deal package (deal form, lease abstract, executed lease, credit app, credit report); enter in Deals database, scan Deal Form and attach routing slip		
DIR OF SALES & LEASING	Review		
PRINCIPAL BROKER	Review		
TRANSACTION COORDINATOR	Review commission calculations and create invoice. Scan pdf to server and file; Send pdf deal form to Marketing & Broker Record deals for reporting purposes, file deals in HR Office		

FILES EXPECTED TO BE COMPLETED THROUGH THE PROCESS WITHIN 3 BUSINESS DAYS

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TRANSACTION FILE CHECKLIST

DATE SET UP _____

LEASE _____ SALE _____ OTHER _____

AGENT(S) _____

TRANSACTION NO. _____

	REQUIRED ITEMS	COMMENTS	PRINCIPAL BROKER	DIR SALES + LEASING
1	Legible copies of lease or earnest money offer (fully executed)			
2	Closing Statement			
3	Agency Disclosure			
4	Listing Agreement/Fee Agreement			
5	Financials			
6	Credit Report			
7	Lease Abstract			
8	Client Trust Funds			
9	Billing Instructions			