EPIK TC

White-Glove Transaction Coordination & Administrative Support

📍 *Professional Real Estate Operations Support*

"Client Onboarding Packet"

Welcome

Thank you for partnering with
Epik TC.

We provide white-glove transaction coordination and administrative support designed to function as a seamless extension of your business.

Our focus is precision, compliance awareness, and proactive communication from contract to close.

This ensures you remain focused on your clients while we manage the structure, deadlines, and coordination behind every transaction.

Our Standard of Service:
Organized • Responsive • Detail-Driven • Discreet

Your Transaction Journey

Steps:

📥 Step 1: Onboarding Received
File setup begins

⬇️
🗂️ Step 2: Compliance & File Review
Systems organized & verified

⬇️
📌 Step 3: Active Coordination Begins
Deadlines + documents managed

⬇️
🔔 Step 4: Proactive Updates
Structured communication flow

⬇️
🏁 Step 5: Closing Coordination
Final review & close-out support

Client Onboarding Form

AGENT & BROKERAGE INFORMATION

Full Legal Name: ______________________________
License Number: ______________________________
Brokerage Name: ______________________________
Broker Contact Information: ______________________________
Phone: ______________________________
Email: ______________________________

SYSTEM ACCESS & TOOLS

Important

📌 Why we request system access

To deliver a seamless, white-glove transaction coordination experience, we require secure access to your transaction systems. This allows us to function as an integrated extension of your business while maintaining accuracy, compliance, and efficiency throughout every file.

With authorized access, we are able to:

- Maintain real-time oversight of contract timelines and compliance requirements
- Ensure accurate, audit-ready file management from start to close
- Coordinate disclosures, escrow, and third-party communication efficiently
- Reduce delays caused by missing documents or system limitations
- Provide a consistent, elevated client experience across all transactions

All access is used strictly for transaction coordination and administrative support in accordance with brokerage compliance standards..

Platforms Access Granted:

- ◻ SkySlope
- ◻ Glide
- ◻ DocuSign
- ◻ MLS
- ◻ None yet

Authorization Status:

- ◻ Yes
- ◻ Not yet
- ◻ In progress

TRANSACTION PREFERENCES

Preferred Title Company: ____________________

Preferred Escrow Officer: ____________________

Preferred Lender: ____________________

Home Inspection Company: ____________________

Termite Inspection Company: ____________________

Roof Inspection Company: ____________________

Other Preferred Vendors: ____________________

COMMUNICATION PREFERENCES

◻ Email ◻ Text ◻ Phone ◻ Mixed

Update Style:

◻ As-needed ◻ Daily ◻ Weekly ◻ Deadline-based

LISTING COORDINATION (IF APPLICABLE)

Will you use listing coordination services?
◻ Yes
◻ No

If YES:
Headshot: ◻ Attached / ◻ Pending
Brokerage Logo: ◻ Attached / ◻ Pending
Agent Bio / Listing Notes:

____

____

Branding Guidelines:

____

____

TRANSACTION COMPENSATION & INSTRUCTIONS

Commission Structure (for file entry only): ______________________________
Referral Agreements Required: ◻ Yes ◻ No
Special Escrow / Commission Instructions:

____

____

TRANSACTION DETAILS

Executed purchase agreement or listing agreement (if applicable):
◻ Yes
◻ No

Escrow / Title Contact Information:

____

____

Disclosures Included:
◻ Yes
◻ No

🟥 BROKERAGE REQUIRED DOCUMENTS

OVERVIEW

To ensure a seamless, compliant, and fully audit-ready transaction experience, all brokerage-required documentation must be submitted at the onset of coordination.

The Brokerage Required Documents Checklist is a priority submission requirement and represents the core foundation of every transaction file. Full coordination services are initiated upon receipt of this completed checklist. Prompt submission allows for precise file structuring, ensures adherence to brokerage compliance standards, and enables a streamlined workflow from contract execution through closing.

01 | PRIORITY TRANSACTION FILE DOCUMENTS

◻ Fully Executed Purchase / Listing Agreement
◻ Counter Offers & All Addenda
◻ Agency Disclosures
◻ Possible Representation of More Than One Buyer or Seller
◻ Confirmation of Real Estate Agency (if applicable)
◻ Buyer / Seller Representation Agreement (if applicable)
◻ Contingency Removal Forms
◻ Amendments & Extensions
◻ Cancellation Documents (if applicable)
◻ All Contractual Attachments

02 | BROKERAGE COMPLIANCE DOCUMENTS

□ Transfer Disclosure Statement (TDS)
□ Seller Property Questionnaire (SPQ)
□ Agent Visual Inspection
□ Natural Hazard Disclosure (NHD) Report and Receipt
□ Lead-Based Paint Disclosure (if applicable)
□ Water Heater & Smoke Detector Compliance
□ Water Conserving Fixture & Carbon Monoxide Detector Disclosure
□ Megan's Law Disclosure
□ Homeowners' Association Documents (if applicable)
□ Solar Disclosure (if applicable)
□ Supplemental Property Tax Disclosure
□ Environmental Hazard Booklet Receipt
□ County Advisories and Disclaimers
□ FIRPTA (AS) - Seller's Affidavit of Nonforeign Status
□ Earthquake Disclosure Form (if applicable)
□ Sewer Lateral Compliance Or Extension
□ San Jose Tree Disclosure (if applicable)
□ Other Required Brokerage Disclosures

Escrow & Title Documents

□ Preliminary Title Report
□ CC&Rs (if applicable)
□ Escrow Instructions
□ Wire Fraud Advisory
□ Earnest Money Deposit Verification
□ Closing Statement (when available)
□ Commission Instructions
□ Referral Agreement (if applicable)

Loan Documents (If Applicable)

□ Pre-Approval Letter
□ Proof of Funds
□ Loan Status Updates
□ Appraisal Information
□ Conditional Loan Approval
□ Clear to Close

Listing Documents (If Applicable)

☐ Listing Agreement
☐ MLS Input Sheet
☐ Seller Advisory
☐ Showing Instructions
☐ Marketing Authorization
☐ Professional Photos
☐ Floor Plan
☐ Property Flyer

03 | BROKERAGE IN-HOUSE FORMS

☐ Office Transaction Checklist
☐ Broker Compliance Review Forms
☐ Brokerage Addenda
☐ Office Policy Acknowledgment
☐ Internal Commission Processing Forms

04 | SUBMISSION CONFIRMATION

☐ Priority Submission Checklist fully completed
☐ All brokerage-required documents included
☐ All in-house forms attached
☐ File is complete and ready for coordination

FINAL AUTHORIZATION

Preferred Weekly Update Method:

◻ Email

◻ Text

◻ Phone Summary

◻ Not Required

Emergency Contact Instructions:

____

____

Authorization to Begin Coordination:

◻ Yes

◻ No

Additional Notes:

____

____

🏁 CLOSING NOTE

Once your onboarding is received and your file is set up, your transaction will be actively managed with structured coordination, proactive communication, and consistent oversight from contract to close.

We look forward to supporting your business with precision and care

✍️ AUTHORIZATION & AGREEMENT PAGE

By submitting this onboarding form, you acknowledge and authorize:

- Epik TC to act in a transaction coordination capacity
- Secure access to applicable transaction platforms for file management
- Administrative handling of documents, deadlines, and coordination tasks
- Communication with relevant parties as required for transaction completion

All services are provided strictly for administrative and coordination purposes and do not replace brokerage, legal, or fiduciary responsibilities.

Client Name: ____
Signature: ____
Date: _________________________

🏁 CLOSING NOTE

Once your onboarding is received and your file is set up, your transaction will be actively managed with structured coordination, proactive communication, and consistent oversight from contract to close.

We look forward to supporting your business with precision and care