The Ultimate TC Quick-Start Checklist

Printable PDF for Transaction Coordinators

1. Onboarding & Document Collection

- ☐ Send welcome email with intake form
- ☐ Collect client details and signed disclosures
- ☐ Confirm document receipt status

2. Timeline Management & Deadline Tracking

- ☐ Populate master timeline with key dates
- ☐ Set automated reminders for critical deadlines
- ☐ Review and update timeline on changes

3. Centralized Communication Hub

- ☐ Consolidate messages in one thread per deal
- ☐ Tag messages by stakeholder role
- ☐ Send milestone status updates

4. Compliance & Audit-Ready Records

- ☐ Record all actions with timestamps
- ☐ Maintain versioned copies of documents
- ☐ Run weekly compliance check for missing items

5. Closing Coordination & Wrap-Up

- ☐ Assemble final closing package
- ☐ Send 48-hour closing reminder
- ☐ Collect post-closing survey responses

Use this checklist to ensure nothing slips through the cracks!