



**REMINDER: ZOOM Webinar
- Friday, June 27**

TRANSACTIONDESK NEW CHECKLIST

**ENGLISH: 11:00 AM ZOOM -
CLICK HERE**

**SPANISH: 11:30 AM ZOOM -
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**IMPORTANT UPDATES: REVISION OF PRE-
SAVED CHECKLISTS**

Hello United Realty Group Agents!
We hope this message finds you well!

If you missed this past weeks, **NEW TD CHECKLIST ZOOM** webinar, we are having another one tomorrow: Friday June 27, 2025 (see below for more info)

We are reaching out to inform you of an important update regarding pre-

saved checklists on our Transaction Desk platform.

As part of our ongoing efforts to enhance operational efficiency and ensure compliance with industry standards, we will be revising the existing file checklists and implementing **12 new checklists** that will cover various types of real estate transactions.

Please note that the mandatory documents required by United Realty Group will NOT be changing, we are simply adding 12 new checklists for agents to utilize to better encompass the wide variety of transactions that agents do.

KEY DETAILS:

- ***Effective Date: Monday June 23, 2025***

WHAT'S CHANGED:

The current file checklists had cosmetic revisions to streamline processes and received updated titles:

- Residential Sale (Representing the Seller)
- Residential Sale (Representing the Buyer)
- Residential Rental (Representing the Landlord)
- Residential Rental (Representing the Tenant)

12 new checklists were added to address additional document requirements and transaction types:

SALES:

- Residential Sale (Representing the Seller and Buyer)
- Commercial Sale (Representing the Seller)
- Commercial Sale (Representing the Buyer)
- Commercial Sale (Representing the Seller and Buyer)
- Preconstruction/New Construction (Representing the Buyer)
- Sales Referral (Client not Represented by URG)

RENTALS:

- Residential Rental (Representing the Landlord and Tenant)
- Commercial Rental (Representing the Landlord)
- Commercial Rental (Representing the Tenant)
- Commercial Rental (Representing the Landlord and Tenant)
- Rental Referral (Client not Represented by URG)
- Rental Renewal (Same Landlord/Tenant Combo)

WHY THIS WAS IMPORTANT:

These updates will help improve consistency in file management, ensure that all necessary documents are collected and processed correctly, and assist in maintaining compliance with local and national regulations. It will also support our commitment to providing the best service to our clients by reducing potential delays and errors in the transaction process.

Review the new checklists: Starting Monday June 23rd, the new checklists were made available to agents to generate when creating a new Transaction Desk File. Current files with the old checklists do not need to generate the new checklists as the mandatory documents for each type of transaction have remained the same.

Reminder: If there is ever anything that agents need to add to their checklists (an additional addendum, a copy of the HOA Approval, etc.) that does not have a pre-entered subsection, then agents are more than welcome to add any additional subsection to their checklists.

- *How to add a subsection to the checklist: Simply click the “add +” button at the top of the checklist, click “add checklist item”, click “document”, enter in the name of the form, select the checklist you'd like to add the subsection to, and then click “save” at the top. The new subsection should be generated at the bottom of the checklist.*

We appreciate your attention to this update and your continued dedication to maintaining the high standards of service that our clients have come to expect. These improvements are designed to support your success and streamline your processes for better efficiency.

Thank you for your cooperation and support.

Best regards,
United Realty Group Inc.

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