

## **AGENT SETTLEMENT PACKAGE CHECKLIST**

*Commission checks will be processed only after receiving a complete settlement package. No exceptions can be made.*

Date: \_\_\_\_\_  
Agent Name: \_\_\_\_\_  
Property Address: \_\_\_\_\_  
\_\_\_\_\_ \$  
Total Commission: \_\_\_\_\_ total to Realty Advantage per CD  
Commission to Agent: \$ \_\_\_\_\_ to You  
Commission Split: \$ \_\_\_\_\_ to other RA Agent (\_\_\_\_\_)  
Referral Commission: \$ \_\_\_\_\_ to other Broker (\_\_\_\_\_)

**\*\*If there is a referral payable to another broker, you must provide a completed Form W-9.\*\***

Referral Broker Address: \_\_\_\_\_  
\_\_\_\_\_

Referral Broker Number: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

**For Sales Contracts:** (agent to initial each applicable item)

- \_\_\_ Signed CD/HUD-1
- \_\_\_ Check from title company
- \_\_\_ All outstanding items from broker contract review have been resolved
- \_\_\_ Copies of all addenda, inspection reports, etc. provided for office file

**For Listings:** (agent to initial each applicable item)

- \_\_\_ Signed CD/HUD-1
- \_\_\_ Check from title company
- \_\_\_ Sign removal request confirmation from LJS
- \_\_\_ All outstanding items from broker contract review have been resolved
- \_\_\_ Keystone status updated to 'Sold'
- \_\_\_ Copies of all addenda, inspection reports, etc. provided for office file

**Administrative Use Only:**

(Admin to initial each applicable item)

- \_\_\_ Settlement package received from agent      Date \_\_\_\_\_
- \_\_\_ Verified completed checklist attached with CD/HUD-1 and check(s)
- \_\_\_ Verified all settlement package items are provided (including sign removal, W-9, etc.)
- \_\_\_ Delivered to manager for review & process      Date \_\_\_\_\_

Notes:

\_\_\_\_\_  
\_\_\_\_\_