



WHAT TO LOOK FOR IN A TRANSACTION COORDINATOR

*Your Go-To Checklist for Hiring the Right TC,
Without the Headache*



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If you're an agent who's ever asked...

- "Do I even need a TC?"
- "How do I know who to trust with my files?"
- "What separates a great TC from just someone who checks boxes?"

This is for you.

Use this checklist to evaluate any transaction coordinator and find the one that will actually make your life easier.

Look for a TC Who...

✓ Understands Your Market + Compliance Rules

Whether local or remote, they should *know your state's contract requirements and your brokerage's compliance process*. If you're constantly explaining things, they're not the right fit.

At Rise Transactions, we specialize in NJ + PA markets and tailor our workflow to your brokerage requirements.

✓ Communicates Proactively, Not Reactively

A good TC doesn't wait for you to ask, "What's the status?" They tell you first.

We provide weekly updates and track every deadline, so you're never left wondering.

✓ Manages Every Detail, Not Just the Docs

It's not just paperwork; it's timelines, coordination with lenders, title, attorneys, and clients. You want someone who can *own the entire process*, not just upload files.

We coordinate with all parties and manage your transaction from start to finish.



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✓ Protects Your Reputation with Your Clients

Your TC is often client-facing. Look for someone who represents your brand well; with professionalism, empathy, and clear communication.

Rise becomes part of your team and helps you look polished, prepared, and professional.

✓ Offers Services That Match Your Workflow

Not every agent needs the same support. The best TC will meet you where you are whether that's pre-listing help, contract prep, full coordination, or just compliance.

We offer multiple service tiers to fit your workflow and budget. No bloated packages, no pressure.

✓ Has a Proven Track Record

Ask for testimonials, examples, and experience. If a TC can't show you real-world success, that's a red flag.

Our clients rave about our communication, organization, and the peace of mind we bring to every file.

Red Flags to Watch Out For:

- ✗ Vague processes or unclear deliverables
- ✗ No follow-up after initial file submission
- ✗ Only available via text or untracked systems
- ✗ Generic service with no understanding of your specific brokerage needs
- ✗ Zero client-facing communication (which puts all the work back on you)

Final Tip:

Your TC should feel like a partner, not a task manager.

The right one will protect your time, elevate your client experience, and help you scale without burning out.

