



19 Email Templates Transaction Coordinators Can Copy to **Work Faster**



Save Time Communicating With All Stakeholders Using These Email Templates for Every Phase of the Real Estate Transaction

Do you find yourself typing the same emails to clients every day? Or, worse, your clients aren't reading them and missing important steps? Wish there was an easier way?

Here, we've created **19** proven email templates — **9** on the listing-side and **10** on the buying-side — that you can copy and customize to help ease your everyday email communication and speed up transactions. Thanks to admin **Brent Davies** for his help with this content.



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EMAIL 1

Welcome

Send to:
Selling Client

Subject Line: **Thank You for Listing Your Property With Us**

Dear [NAMES],

Please allow me to introduce myself. My name is [NAME], and I am the Transaction Coordinator who will be working on your listing with [AGENT'S NAME]. It is our goal to ensure that your closing runs smoothly and efficiently.

Throughout this process, you will be receiving several emails from me with updates, reminders and an occasional question. Your listing information has been shared with you through our digital transaction management software, dotloop. We will use dotloop to authorize any changes to your listing and to execute any offers.

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 2

Notification About Listing Online

Send to:
Selling Client

When:
24 hours after thank you.

Subject Line: Your Home is Live on the Internet

Dear [NAMES],

Congratulations, your home is officially listed and live on the internet! To view your listing, please click on this link [INSERT LINK].

To view your home on the MLS, please use this link: [INSERT MLS LISTING].

To view on Zillow, please use this link: [INSERT ZILLOW LISTING].

To view the guided tour, please use this link: [INSERT VIRTUAL TOUR].

I hope you find these resources helpful and informative as the buyer vetting begins. Please email me if there are any needed changes or corrections.

Sincerely,

[TC'S NAME]

EMAIL 3

Home Under Contract

Send to:
Selling Client

Subject Line: Your Home is Under Contract!

Dear [NAMES],

Congratulations! Your home is under contract. Here is a timeline of the important events leading to your closing.

- 1. Your Effective Start Date** is [EFFECTIVE START DATE].
- 2. Escrow Deposit** is due to [TITLE COMPANY] by [ESCROW DUE DATE].
- 3. Home Inspection** is due by [INSPECTION DUE DATE]. You do not have to attend, but it is recommended that you do. A septic inspection, wind mitigation and/or a wood destroying organism (WDO) inspection may also be scheduled for the same time or separately if necessary.
- 4. Title Commitment** is due by [TITLE] from the title company. In this commitment, the title insurance company discloses to all parties involved in the real estate transaction any defects, liens and obligations that affect the property.
- 5. Your Home's Appraisal** is due [APPRAISAL DUE DATE] and is initiated by the lender to ensure the loan value is supported by an appraised value. You will be notified when this is scheduled.
- 6. The Loan Approval** is due from the buyer's lender by [LOAN APPROVAL DATE]. This signifies the buyer's mortgage is approved for closing.
- 7. Survey** may be due before closing and will be ordered by the title company. We will let you know when/if this is scheduled.
- 8. Final Walk-Through** will be scheduled before the buyer's closing. This usually occurs right before the buyer's signing but sometimes happens the day before so they can see the property one last time before the purchase. Don't forget to turn all utilities on for this walk-through.

If everything goes according to plan, then you will be closing on [CLOSE DATE].

You will be contacted soon by the closing agent at [TITLE CO NAME]. Please work with them on any information they might need to get you to the closing table on time.

A copy of your executed contract is available for you on dotloop. If you have any questions about this timeline or at any time along the process, please do not hesitate to reach out to [AGENT NAME] or myself. We are here to explain, advise and help!

Sincerely,

[TC'S NAME]

EMAIL 4

Escrow Update

Send to:
Selling Client

Subject Line: Escrow Update

Dear [NAMES],

Just a quick note to let you know that the title company is in receipt of the escrow deposit. Please let us know if you have any questions or concerns.

Sincerely,

[TC's NAME]

EMAIL 5

Survey

Send to:
Selling Client

Subject Line: [PROPERTY ADDRESS] Survey Due

Dear [NAMES],

Just a quick note to make you aware that [SURVEYOR'S NAME] will be out before [DATE] to conduct a survey of the property. There is nothing you need to do, but please be aware in case you see the crew or if little flags pop up in the yard outlining the lot.

As always, let us know if you have any questions or concerns.

Sincerely,

[TC'S NAME]

EMAIL 6

Title Commitment

Send to:
Selling Client

Subject Line: Title Commitment Enclosed

Hello [NAMES],

Here is a copy of the title commitment for your review. This commitment reflects the title insurance company's disclosure to all parties involved in the real estate transaction of any defects, liens and obligations that affect the property. There is nothing for you to sign, but you should review this information. If you have any questions or concerns with this report, please contact [THE AGENT].

Sincerely,

[TC'S NAME]

EMAIL 7

5 GUIDING PRINCIPLES OF REAL ESTATE TEAMS

Approaching Closing

Send to:
Selling Client

When:
Send 2 weeks prior to closing

Subject Line: Important Pre-Close Steps Enclosed

Dear [NAMES],

I hope you are doing well and getting excited for your closing in approximately 2 weeks. Here are a few last-minute details to consider:

Utilities: If you haven't already done so, please make arrangements to have your utilities disconnected the day after closing. This will ensure everything is working for a final walk-through or in case of any unforeseen event at closing.

Move Out: Also, it is customary to move all belongings out of the property by at least the day prior to closing. Additionally:

- Please broom-sweep the property
- Wipe down all surfaces
- Discard all trash in a trash bin
- Remove all chemicals and/or pesticides (touchup paint is OK)
- Wipe down and clean appliances
- Please leave additional keys or entry devices with any manuals or special instructions in a drawer in the kitchen. (I will inform the buyer's agent where they can find these items.)

In other words, please leave the home in the condition that you would expect to receive it if you were purchasing the property.

I have reached out to the buyer's agent to set up a final walk-through. As soon as I receive that date, I will let you know.

As always, please let us know if you have any questions or concerns.

Sincerely,

[TC'S NAME]

EMAIL 8

Closing

Send to:
Selling Client

Subject Line: Important Closing Information

Dear [NAMES],

Your signing will take place at [TITLE CO NAME]. They can be reached at [TITLE CO PHONE].
Their office is [LOCATED AT-DIRECTIONS].

You will need to bring:

- 2 forms of ID
- Driver's license or state ID
- Social security card, passport, insurance card or voter registration card
(credit cards are not acceptable)
- Voided check or at least your bank account number and bank routing
number for wiring of your proceeds

Please do not hesitate to call or contact any of us if you have any comments, questions or concerns. We are here to help!

Sincerely,

[TC'S NAME]

EMAIL 9

Approaching Closing

Send to:
Buyer's Agent

Subject Line: Pre-Close Check-in on [ADDRESS]

Dear [NAMES],

As we approach the closing of [PROPERTY ADDRESS], we wanted to check in on a few details:

1. Are we still on track for closing?
2. When would you like to conduct the final walk-through?

Please let me know if you have any other questions or concerns.

Sincerely,

[TC'S NAME]

EMAIL 1

Welcome

Send to:
Buying Client

Subject Line: Congratulations and Welcome

Dear [NAMES],

Thank you for trusting us to lead your home buying experience. Please allow me to introduce myself. My name is [NAME], and I will be the Transaction Coordinator who will be working with you and [AGENT'S NAME]. We will work together to ensure that your homebuying experience runs smoothly and seamlessly.

Now that your contract has been accepted as of [EFFECTIVE DATE], here is a timeline of important dates to come:

Inspection is due by [INSPECTION DATE] (an inspection information email from me to follow).

Appraisal is due by [APPRAISAL DATE]. (This will be initiated by your lender.)

Loan Approval is due by [DATE]. (Your mortgage is conditionally approved and waiting for the underwriters to clear to close.)

Closing Day is set for [DATE].

If, for any reason, you feel that you will be unable to meet any of the deadlines, please let us know at least two days in advance, so we can take action to keep you under contract.

Throughout this process, you will be receiving several emails from me with updates, reminders and an occasional question. Your transaction documents will be shared with you through our digital transaction management system, dotloop. We will use dotloop to authorize any changes to your documents and contracts and to execute any offers.

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 2

Escrow and Title Co

Send to:
Buying Client

Dear [NAMES],

Please be informed that [POINT OF CONTACT] AT [NAME OF TITLE CO] will be handling your title at closing. It's important that you're aware of common wire fraud issues if you are wiring your escrow deposit.

IMPORTANT NOTICE: Never trust wiring instructions sent via email. Cyber criminals are hacking email accounts and sending emails with fake wiring instructions. These emails are convincing and sophisticated. Always independently confirm wiring instructions in person or via a telephone call to a trusted and verified phone number. Never wire money without double-checking that the wiring instructions are correct.

Alternatively, you may choose to use Earnnest, a safer, secure method of digitally sending the deposit funds through our transaction management software, dotloop. I can assist with this if you are interested.

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 3

Preparing for Inspection

Send to:
Selling Client

Subject Line: Preparing for Your Inspection

Dear [NAMES],

It's time for your home inspection! This is an important part of the homebuying process and an opportunity for you to gain a thorough understanding of the condition of the property. A septic inspection, wind mitigation and/or a wood destroying organism (WDO) inspection may also be scheduled for the same time or separately if necessary. If at all possible, it's important that you attend the inspections.

Here are a few inspection companies we would recommend. You may select any company you wish.

[INSPECTION CO 1 NAME, ADDRESS, PHONE]

[INSPECTION CO 2 NAME, ADDRESS, PHONE]

[INSPECTION CO 3 NAME, ADDRESS, PHONE]

Following the inspection, you will receive a written report, usually within a day or so. Feel free to contact us to discuss any concerns or issues that may arise.

Per the contract, your inspection period ends on [INSPECTION DATE]. Please schedule your inspection no later than 2 days before [INSPECTION DATE]. Of course, the earlier the better in case there are problems or concerns that need to be negotiated.

Let us know when you have your inspection scheduled and who you will be using so we can notify the Listing Agent.

As always, if you have any questions, comments or concerns we are more than happy to help!

Sincerely,

[TC'S NAME]

EMAIL 4

Escrow Update

Send to:
Buying Client

Subject Line: Escrow Funds Received

Dear [NAMES],

Just a quick note to let you know that the title company is in receipt of your escrow deposit. Please let us know if you have any questions or concerns.

Sincerely,

[TC'S NAME]

EMAIL 5

Utility and Service Providers

Send to:
Buying Client

When:
Send toward the middle of the transaction

Subject Line: Helpful Service Provider Information

Dear [NAMES],

We're getting close! As we approach the close on your new home, we thought you would appreciate a list of local utility and service providers that might assist in helping you settle in seamlessly and without interruption to services.

For your convenience, many of these providers can also be found in dotloop under the "Trusted Service Providers" section.

Utilities:

Electric/Gas: [INSERT ELECTRIC/GAS UTILITY PROVIDER]

Internet Provider: [INSERT INTERNET PROVIDER]

Phone Company: [INSERT PHONE PROVIDER]

Waste Management: [INSERT WASTE MANAGEMENT CO INFO]

Third Party Service Providers:

HVAC: [INSERT HVAC CONTACT INFO]

General Contractor/Handyman: [INSERT POC]

Electrician: [INSERT ELECTRICIAN INFO]

Landscaping: [INSERT LANDSCAPING INFO]

Pool Maintenance: [INSERT POOL MAINTENANCE INFO]

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 6

Title Commitment

Send to:
Buying Client

Subject Line: Title Commitment Enclosed

Dear [NAMES],

Here is a copy of the Title Commitment for your review. This commitment is where the title insurance company discloses to all parties involved in the real estate transaction the defects, liens and obligations that affect the property you are buying. There is nothing for you to sign, but you should review it. If you have any questions or concerns with this report, please contact [THE AGENT].

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 7

Closing Details

Send to:
Buying Client

Subject Line: Preparing for Your Closing

Dear [NAMES],

I hope you are doing well and getting excited for your upcoming closing. Here are a few details to consider:

Your closing is expected to take place at [NAME OF CLOSING LOCATION] located at [ADDRESS] on [DATE OF CLOSING].

In preparation for the closing, you will want to schedule the utilities and services at your new address to activate the day after closing. Below are links to help you get these services set up:

Electricity – Power Company Hyperlink

Water – Water Company Hyperlink

Trash/Recycling – Trash/Recycling Services Hyperlink

Internet / Cable / Phone – Provider Hyperlink for home's address

Once you get your CD (Closing Disclosure) from your lender, you will need to wire your closing funds (if any) to the title company. This is the same place and same instructions that you used to send your escrow deposit.

Your closing will take place at [TITLE COMPANY] on [CLOSING DATE] at [CLOSING TIME], located at [TITLE ADDRESS] and they can be reached at [TITLE PHONE].

You will need to bring 2 forms of ID with you: a driver's license or state ID and a Social Security card, passport, insurance card or voter registration card are acceptable forms (Credit cards will NOT be accepted).

The last item is setting up a final walk-through. Typically, this is done the day before closing so you can take one last look at the property before you purchase it. Please let me know when you would like to set up your walk-through.

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 8

Appraisal Order

Send to:
Buying Client

Subject Line: Appraisal Order

Dear [NAMES],

I hope you are doing well. The Inspection Contingency has been removed. If it has not been done so already, we are ready to order the appraisal and will be reaching out to your lender. Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 9

Written Statement

Send to:
Lender

Subject Line: Written Statement Due

Dear [NAMES],

Just a friendly reminder that the written statement for [PROPERTY ADDRESS] is due on [LOAN FINANCE DEADLINE].

Please don't hesitate to reach out with any questions or concerns. I'm here to help.

Sincerely,

[TC'S NAME]

EMAIL 10

Approaching Closing

Send to:
Buying Client

Subject Line: Closing on [PROPERTY ADDRESS]

Dear [LISTING AGENT'S NAME],

As we are approaching the close date for [PROPERTY ADDRESS] on [CLOSE DATE], we wanted to make sure the sellers are still on track for closing. The buyers will be conducting their final walk-through on [DATE] at [TIME].

Please let me know if there are any questions or concerns.

Sincerely,

[TC'S NAME]

