

NEW SALE TAKE SHEET

Property & COE Information

COE Date:		Representing:		Buyer	Seller	Both
Property Address:						
APN#:		MLS#:		Escrow#:		
List Price:		Sales Price:		Commission Rate:	Listing Agent: %	Selling Agent: %
Contract Date:		Acceptance Date:		Contingency Removal Date:		
Escrow Company:		Escrow Officer:		Contact #:		Email:
Year Built:	Condo:	Single Family Attached:	Single Family Detached:	Vacant Lot:	Other:	
Furnished: <input type="checkbox"/> YES or <input type="checkbox"/> NO or <input type="checkbox"/> Available Outside Escrow				Notes:		

Listing Side Information

LISTING AGENT	Contact:	Subdivision:
Office	Contact:	Floor Plan:
Seller's Names		
Mailing Address		
Seller's Phone #	Seller's Email	

Selling Side Information

SELLING AGENT	Contact:	Subdivision:
Office	Contact:	Floor Plan:
Buyer's Names		
Mailing Address		
Buyer's Phone #	Buyer's Email	

HOA, Lender, Title, Financing, Information

HOA	Contact
Lender	Contact
Title Company	Title Rep
Financing Type	

Membership Information

SUBDIVISION: (select one) PGA WEST CITRUS OTHER: _____ NO MEMBERSHIP

REFERRED To: Name _____ DATE _____

Home Warranty Company: _____

California Lifestyle TC to order? YES **Separate Worksheet needs to be filled out.* NO

Selling Source – Please Choose One:

<input type="checkbox"/> Builder/Developer	<input type="checkbox"/> Direct Mail Agent Piece	<input type="checkbox"/> Name Recognition	<input type="checkbox"/> Personal Friend	<input type="checkbox"/> Walk In Discovery Center
<input type="checkbox"/> Call In from Listing	<input type="checkbox"/> FSBO-For Sale by Owner	<input type="checkbox"/> National Newspaper Ad	<input type="checkbox"/> Personal Friend Referral	<input type="checkbox"/> Walk In Lifestyle
<input type="checkbox"/> Citrus Membership	<input type="checkbox"/> Floor Time Call In	<input type="checkbox"/> Neighbor	<input type="checkbox"/> Realtor.com	<input type="checkbox"/> Walk In Mt/Dunes
<input type="checkbox"/> Client Referral	<input type="checkbox"/> Flyer of Property	<input type="checkbox"/> Office Referral Broker	<input type="checkbox"/> Referral	<input type="checkbox"/> Walk In Stadium
<input type="checkbox"/> Co Op Broker	<input type="checkbox"/> Hilton Employee	<input type="checkbox"/> Office Referral Agent	<input type="checkbox"/> Repeat Client	<input type="checkbox"/> Yard Sign
<input type="checkbox"/> Cold Calling	<input type="checkbox"/> Just Listed Card	<input type="checkbox"/> Open House	<input type="checkbox"/> Residence Club Referral	<input type="checkbox"/> Zillow
<input type="checkbox"/> Co/Office Website	<input type="checkbox"/> Just Sold Card	<input type="checkbox"/> Outside Broker Referral	<input type="checkbox"/> Showing Property in Area	
<input type="checkbox"/> Local Newspaper Ad	<input type="checkbox"/> PGA Membership	<input type="checkbox"/> Sales Associate Website	<input type="checkbox"/> TV Spot	

If it is a Referral.....it is a REFERRAL FROM WHO? _____ OTHER: _____

IN ORDER TO ACTIVATE A SALE WITH THE OFFICE, YOU MUST COMPLETE IN FULL AND SUBMIT THIS FORM ALONG WITH THE FORMS REFER TO THE INTERNAL TRANSACTION CHECKLIST FOR ALL OTHER FORMS REQUIRED TO COMPLETE THE FILE ON OR PRIOR TO THE CLOSE OF ESCROW. PLEASE REFER TO PAGE 2 OF THE INTERNAL TRANSACTION CHECKLIST FOR OPTIONAL FORMS THAT MIGHT BE REQUIRED TO COMPLETE THE FILE DEPENDING ON THE TRANSACTION TYPE.

****COMMISSION CHECKS WILL NOT BE RELEASED UNTIL THE OFFICE FILE IS DEEMED COMPLETE BY BROKER STANDARDS****