



Trio reviews all executed purchase and sale agreement ("PSA") for conformance with its requirements based on submission date. Real estate professionals working with Trio Customers should complete this form along with an agent prepared Comparative Market Analysis ("CMA") with a submitted home for financing with Trio. Further guidance is available for real estate professionals at [trioresidential.com](http://trioresidential.com) or by contacting us at [partners@thinktrio.com](mailto:partners@thinktrio.com). Incomplete forms may cause a delay in Trio approval.

Trio Customer \_\_\_\_\_ Cust ID #: \_\_\_\_\_  
 Property Address: \_\_\_\_\_  
 Agent Name: \_\_\_\_\_ Phone #: \_\_\_\_\_ Email: \_\_\_\_\_  
 Date of PSA Acceptance: \_\_\_\_\_ Closing Date: \_\_\_\_\_  
 List Price: \$ \_\_\_\_\_ Property Taxes: \$ \_\_\_\_\_  
 Negotiated Price: \$ \_\_\_\_\_ Assessor's Office Location: \_\_\_\_\_ (County, City, etc.)  
 CMA Value (by Agent): \$ \_\_\_\_\_ HOA Dues: \$ \_\_\_\_\_  Monthly  Yearly  
 Earnest Money: \$ \_\_\_\_\_ HOA Rental Restrictions:  Yes or  No  
 Year Built: \_\_\_\_\_ Interior Sq Ft: \_\_\_\_\_  
 Bed / Bath: \_\_\_\_\_ / \_\_\_\_\_ New Construction:  Yes or  No

**Trio Contract Requirements (Check if Conforms with Requirements):**

- Meets Trio Maximum Approved Payment**  
 (Equal or Lower than Trio Customer Approval and Trio Area Approved Maximum)
- FHA Financing Contingency Included**
- Buyer's agent has confirmed with listing agent that NO other FHA appraisal has been ordered for this property in the last six months.**  Yes  No
- Trio Assignment Addendum or Assignment Language Included**
- Home Inspection Included. Copy Provided to Trio:**  Yes  No  
 Unresolved Issues: \_\_\_\_\_
- Seller Paid Home Warranty.**  Yes  No; **If yes, amount paid: \$** \_\_\_\_\_  
 Visit [www.homewarranty.com](http://www.homewarranty.com) to place the warranty order and upload a copy of the Initiating Agent Order Confirmation to your transaction upon receipt.
- Home Condition:**  New  Built within the last 10 years  Older than 10 years  Renovated in last 10 years  
**Age of:** \_\_\_\_\_ **Roof;** \_\_\_\_\_ **HVAC;** \_\_\_\_\_ **Plumbing;** \_\_\_\_\_ **Roof Certification if Older than 10 Years**  Yes  No
- Targeted 3% Price Seller Credit for Closing Costs.**  
 Amount of Concession: \$ \_\_\_\_\_. Percentage of List Price: \_\_\_\_%  
 If not met in contract, how will the minimum be paid?  
 Trio Customer \$ \_\_\_\_\_;  Agent Commission \$ \_\_\_\_\_;  Other \$ \_\_\_\_\_

If a Trio prescribed requirement is not met, the following is the proposed resolution:

**Items Included:**

- Stove/Range  Refrigerator  Dishwasher  Microwave  Washer  Dryer  Fireplace Insert  Wood Stove  
 Security System  Attached Television  Attached Speakers  Satellite Dish/Operating equipment  Hot Tub  Pool  
 Other \_\_\_\_\_

Closing Agent: Closing Office: \_\_\_\_\_

Closer Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Submitted By: \_\_\_\_\_ (Agent) Date: \_\_\_\_\_

Agent Phone #: \_\_\_\_\_ Email Address: \_\_\_\_\_