



SMARTTM

Transactional Management

a Division of Smart Group Consulting, LLC

*Coordinating confidence and clarity
throughout the transactional process.SM*



Vision

- Smart Group Consulting formed in 2005
- Launched **Smart Transactional Management (STM)** in January 2008
- To dramatically increase the proficiency of a transaction by focusing our efforts on effectively coordinating all key benchmarks in the process



Our Team

- **Brett Toyne**, *Founder & CEO*
- **Philip Gower**, *Managing Partner*
- **Marce Jost**, *Vice President of Operations*
- **Joshua Solomon**, *Vice President of Sales*

A team of experienced professionals with over 50 years combined experience in the mortgage and real estate industries. Smart Group Consulting is focused on providing the highest possible service provided by the highest quality people.



Market

- Credit crunch has caused highly volatile and ever-changing mortgage and real estate market
- Critical need for knowledge of the transaction status
- The sales transaction is now the most regulated and “out of your hands” piece of the process
- Timely closings are key



Value

- Our industry-expert Coordinators manage the volatility of the sales transaction
- We coordinate the flow of the transaction which constitutes the most important aspect of the entire cycle
- We provide access and information which gives all parties the power of knowledge
- Reporting and analysis of all transactions



What We Do

- ➊ Monitor and communicate every step of a transaction – PA to Close
- ➋ Utilize state-of-the-art technology to track and connect all parties involved
- ➌ Store and archive your transaction information and documents
- ➍ Utilize Purchase Agreement Disclosure to notify all parties of STM monitoring the transaction



Technology

The screenshot displays a web browser window with the address bar showing "https://www3.settlementroom.com - Transaction Summary - Mozilla Firefox". The page header features the SMART logo, the text "SMART Transactional Management a Division of Smart Group Consulting, LLC", and contact information: "7965 Stone Creek Drive Chanhassen MN, 55317", "Phone: (952) 470-8700", and "Fax: (952) 474-4643".

The main content area is titled "Transaction Summary Preview For:" and is divided into several sections:

- Transaction Details:** Includes a photograph of a white house with a grey roof, surrounded by greenery and a small pond.
- Address:** 18005 31st Ave. N
City: Plymouth
State/Province: Minnesota
Zip/Postal Code: 55447
Country: United States
Property Type: Attached
Status: Listing
Transaction Host: Philip Gower
Transaction Owner: Smart Group
Transaction Number: SGR0613cxkgraf252
- Actions:** A list of links including "Switch Transactions", "Post a Message", "New Note", "Upload a Document", "Fax-In a Document", "Email-In a Document", "Get a Document Viewer", "Change Your Password/User Info", "Printable Schedule", and "Logout".
- Documents:** "No Documents"
- Web Links:** "No Web Links"
- Transaction Notes:** A table with columns "Date / Author" and "Title / Content", showing "No Notes".

The browser's taskbar at the bottom shows the Windows Start button, several open applications (Inbox - Microsoft..., MARCE JOST BIO..., Microsoft Office..., SR Invite/Add Co...), and the address bar with the current URL. The system tray on the right shows the time as 1:31 PM.

ROI

- Broker/Agent hours spent tracking
- Non-revenue generating tasks
- Redeploy support personnel or your time

Think about this... 1 Month

Time spent on follow up? (per hour \$)

How many new client calls made?

What marketing campaigns went out?



Getting Started


- Discovery meeting to design templates
- **STM** uploads your transactions and sets permissions & access to communications
- One designated Admin person
- 1-on-1 training
- Pricing plan (single or bundled)
- 1 year service agreement (Start Date)



FAQ

- How do we receive communication from **STM**?
- Who does **STM** coordinate with?
- Who gets access to the information?
- Does **STM** access personal data?
- Where are the coordinators?
- Is the system available 24/7?
- Why would I not utilize **STM**?





Thank you for your time!
You have completed the first
step towards transactional
FREEDOM!SM

Continue the Journey...

