

Closing Checklist

AT LISTING

- **Request a copy of the prior survey from your client.** If the parties to the contract have agreed to use a prior survey, present it to Lawyers Title for review when you receive the contract.
- **Request HOA information.** This helps us support you in meeting contract deadlines.
- **Determine your client's marital status at listing for the entire time they have owned the property.** If there has been a divorce or remarriage during the ownership period, please inform your escrow officer.
- **Request loan payoff information at the time of listing:** name of bank, social security number, loan number and an estimated principle balance for all loans on the property. This will help your closer if you need an estimated closing statement/net sheet, and will facilitate obtaining an official payoff statement more quickly.

*There are quite a few items the title company will need that you can request at the time of listing. Please feel free to utilize Lawyers Title's *Listing Appointment Checklist for Title*.

AT CONTRACT AND EARNEST MONEY DELIVERY

- Contract signed by all parties including any initialed changes made to contract and all dates completed
- Earnest money check attached and made payable to: **Lawyers Title**.
- Contact information for all parties including addresses, phone numbers, and emails
- Any applicable exhibits or addendums.

DURING ESCROW

- Inform your Lawyers Title closer if the transaction is linked to another closing e.g., if the Sellers need the proceeds quickly for a purchase, or if the Buyers funds are coming from another closing.
- Inform your closer if your clients are first-time Buyers or Sellers. We appreciate the opportunity to plan extra time with your clients to make sure all their questions are answered.
- Inform your closer about any special circumstances, for example, your clients are not US citizens, do not speak English or have a disability. We appreciate the opportunity to plan in advance to take care of your client's special needs.
- If a Power of Attorney is being used, please notify both the title company and lender well before closing. We will need the original document at closing and are legally required to contact the person granting the power of attorney on the day of closing.

ADDITIONAL ITEMS TO DISCUSS PRIOR TO CLOSING

- Whenever possible, avoid scheduling your closing during the last few days of the month. Your clients will enjoy more options when scheduling closing appointments and last minute changes or issues will be easier to resolve.
- Make sure your clients bring "good funds" to the closing table, either a cashier's check or wire transfer.