

# Agent's Escrow Checklist



Property Address: \_\_\_\_\_ C.O.E. Date: \_\_\_\_\_

- \_\_\_\_\_  
(Date Completed)
- 1) Deliver copies of purchase contract, counters and related paperwork along with the Buyer's earnest money.  
Note: Copies of the following paperwork to be provided at a minimum:
    - a. Name and Company of Cooperating Agent
    - b. Commission Split (both sides)
    - c. Existing Loan Information for payoff or assumption
    - d. Homeowners Association Information
    - e. New Loan, Company and Loan Officer
    - f. Special Instructions to Escrow Officer (i.e. death certificate, divorce, parties out of state, power of attorney, trusts, etc.)
  - \_\_\_\_\_  
2) Receive Receipt for Earnest Money with Escrow Number: \_\_\_\_\_
  - \_\_\_\_\_  
3) Receive Escrow Instructions & Preliminary Title Report (5 to 7 days after opening escrow).
  - \_\_\_\_\_  
4) Review Escrow Instructions and make corrections, if any, then back to Escrow Officer.
  - \_\_\_\_\_  
5) Obtain Parties Signatures on Escrow Instructions and return to Escrow Officer.
  - \_\_\_\_\_  
6) Return Commission Order signed by Broker to Escrow Officer.
  - \_\_\_\_\_  
7) Follow on Loan Process and get commitment for Loan Documents to be made available prior to close of escrow date.
  - \_\_\_\_\_  
8) Complete home Inspection, if required, and advise Escrow Officer of any repairs to be made and when receipts will be provided.
  - \_\_\_\_\_  
9) Advise Buyers to apply for a new Home Hazard Insurance Policy. Buyer and property must qualify for insurance. Policy to be ordered and provided to Lender/Escrow Officer with Company Name and Phone Number.
  - \_\_\_\_\_  
10) Advise Buyers that a CASHIERS CHECK will be needed at Close of Escrow.
  - \_\_\_\_\_  
11) Advise Escrow Officer when buyer has written Loan Approval.
  - \_\_\_\_\_  
12) Make closing appointment with Escrow Officer.

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Office: \_\_\_\_\_

## Miscellaneous items to check on:

- \_\_\_\_\_  
Home Warranty to be provided
- \_\_\_\_\_  
Termite Inspection
- \_\_\_\_\_  
Repair Bills (per contract)
- \_\_\_\_\_  
Walk-thru Inspection
- \_\_\_\_\_  
Insurance

Escrow Officer: \_\_\_\_\_ Phone: \_\_\_\_\_