



**When opening escrow, be sure to provide your escrow officer with the following:**

- ☐ Fully executed copy of the Purchase Contract with complete property address including zip code, include property profile if available
- ☐ All Amendments, Counter Offers, Addendums
- ☐ Completed TERM SHEET
- ☐ Earnest Money
- ☐ Statement of Information for Buyer(s) and Seller(s)
- ☐ Solar panel system? Inform Escrow Officer if leased or owned
- ☐ Existing Loan information
- ☐ Direct who is to receive electronic copies of all documents such as preliminary report, CC&R's etc..
- ☐ Let your escrow officer know immediately if the Seller is a non-resident as additional disclosures may be required
- ☐ If Seller or Buyer is a corporation, submit the Articles of Incorporation, bylaws, and a corporate resolution authorizing the sale or purchase of the subject property
- ☐ If the Seller or Buyer is a partnership, submit a copy of the partnership agreement and a copy of the recorded statement/ certificate of partnership
- ☐ If the Seller or Buyer is a trust entity, submit a copy of the trust agreement and a signed verification of trustee
- ☐ If the Seller or Buyer plan to go out of the country and in need of a Power of Attorney, please notify your escrow officer immediately

**Within first 10 days of escrow:**

- ☐ Order all inspections
- ☐ If corrective work is required, provide information to your escrow officer as to who is paying the fee
- ☐ Followup with the Buyer(s) to make sure that they have submitted all documents that their lender requires
- ☐ Review the Preliminary Title Report carefully
- ☐ Educate the Buyer(s) on the importance of "Homeowner's Title Policy", when in doubt connect them with your local Consumer's Title Company Account Executive.

- ☐ Inform your escrow officer of any changes in contract
- ☐ Let your escrow officer know how your buyer(s) are taking title on the property
- ☐ Constant Communicate between all parties is KEY TO A SMOOTH CLOSING!

**10 days before Closing:**

- ☐ Ensure all amendments and exhibits are provided to lender
- ☐ Provide any additional amendments to contract
- ☐ Ensure all seller-paid closing costs are in place and have NO changes
- ☐ Ensure Home Warranty is in place
- ☐ Verify with your escrow officer on all funds needed for closing
- ☐ Carefully review pre-audit settlement statement
- ☐ Ensure Hazard Insurance is in place
- ☐ Conduct client walk-through

**What to expect at Signing Appointment (Consummation Date)?**

- ☐ Your Buyer(s) should expect to sign at the escrow office one or two business days before closing date
- ☐ If funds are required to close, ensure your buyer(s) to bring a cashier's check to the Escrow Office 24 hours before recording or wire transfer the same day as closing
- ☐ Your Buyer(s) and Seller(s) must have a valid photo ID available at signing, acceptable ID includes: Driver's License, State ID or Passport

**Contact us immediately if you have any questions.**