

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: _____