

CHECKLIST FOR A SMOOTH CLOSING EXPERIENCE

Your help will ensure a positive experience for you and your clients!

AT THE TIME OF 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 Alamo 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's 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 principal balance for all loans on the property. This will help your closer if you need an estimated closing statement/net sheet, and will facilitate getting an official payoff statement more quickly.

MAKING THE CLOSING A SMOOTH ONE:

- Inform your Alamo 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 Buyer's 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 challenges with your client, for example, they 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 used, please notify both the title company and lender well before closing. We'll need the original document at closing and are legally required to contact the person granting the power of attorney of the day of closing.

OTHER ITEMS TO DISCUSS WITH YOUR CLIENTS PRIOR TO CLOSING:

- When possible, avoid planning your closings for the last few days of the months. Your clients will enjoy more options as to closing appointments and last minute changes or issues will be easier to take care of for them.
- Bring "good funds" to the closing table - in other words, a cashier's check or wire transfer.



Brian and Dina Murphy
Coldwell Banker D'Ann Harper Realtors®
571-331-5371 and -5374
murphyteam@cbharper.com

