

This checklist summarizes important information about the closing process, including what occurs during each stage and actions that will help facilitate a smooth transaction.

KEY INFORMATION

Property Address: _____	Escrow Officer's Name: _____
Client Name(s): _____	Email Address: _____
Email Address: _____	Phone Number: _____
Phone Number: _____	

PRIOR TO CLOSING

- ☐ Open title request as soon as possible to avoid potential delays.
- ☐ Schedule a closing appointment as soon as possible, especially for a closing to occur at the end of the month.
Date of Closing: _____/_____/_____
Time of Closing: _____
Closing Location: _____
- ☐ Notify clients that a copy of the Closing Disclosure (CD) will be provided by the lender, at least three business days before closing of the loan.
- ☐ Inform buyer(s) that they must bring certified funds or a cashier's check to the closing, or arrange to wire funds to Old Republic Title®.
- ☐ If title is held or to be held individually, make married buyer(s) and/or seller(s) aware that spouses must attend closing unless prior arrangements have been made with the escrow officer shown above.
- ☐ Inform buyer(s) that keys will not be provided until the lender grants funding approval.
- ☐ Inform seller(s) that funds will not be provided until the lender grants funding approval.

ITEMS TO BRING TO CLOSING

Buyers

- ☐ Valid, government-issued photo identification (both spouses).
- ☐ Good funds in the form of a certified check, cashier's check or arrange to wire funds to Old Republic Title.
- ☐ Other _____

ITEMS TO BRING TO CLOSING

Sellers

- ☐ Valid, government-issued photo identification (both spouses).
- ☐ All keys and garage door openers to the property.
- ☐ All repair receipts, if applicable.
- ☐ Lease-back check payable to buyer(s), if applicable.
- ☐ Wiring instructions, if applicable, including bank name, ABA number, name on the account and account number.
- ☐ Other _____

Real Estate Agent

- ☐ Wiring instructions, if applicable, including bank name, ABA number, name on the account and account number.
- ☐ Other _____

AT CLOSING

- ☐ The final versions of the CD and all final documentation are executed by buyer(s) and seller(s).
- ☐ A certified check, cashier's check or wired funds are provided to the escrow officer.
- ☐ Copies of all executed documents are provided to buyer(s) and seller(s).

AFTER CLOSING

- ☐ Funding conditions are faxed to the lender.
- ☐ Funding approval is provided by the lender.
- ☐ Agent(s), buyer(s) and seller(s) are contacted to collect keys, garage door openers and funds from Old Republic Title.
- ☐ Funds are distributed in accordance with the CD.