



Agent's Escrow Checklist

Please provide the following:

How would the buyer(s) like to take title?

Please contact us today for further information about common ways to take title.

What is the correct spelling and full name of the buyer(s) as should be on record?

If there is a Homeowner's Association, provide us with the name, address, and phone number of the management company:

Hazard insurance agent's name and phone number:

If Seller or Buyer is a Corporation, LLC, or a Partnership, please submit all required documentation

i.e.; Articles of Incorporation, Bylaws, Partnership Agreement, Resolution, etc. Once documents are supplied, escrow will instruct further.

If the Seller or Buyer is a trust entity, submit a copy of the trust agreement and a signed verification of trustee.

Important Considerations:

- Y N Are your principals exchanging this property?
- Y N Does the property qualify as seller's principal residence?
- Y N Has there been any recent construction/remodeling?
- Y N Will your principals be using a Power of Attorney?
If "yes" additional instructions are required from escrow.
- Y N Are any of the parties in title deceased?
- Y N Has there been a change in marital status?
- Y N Will there be a new entity formed? (i.e.; partnership or corporation)
- Y N Is the seller a foreign transferor that may be subject to FIRPTA?
- Y N Are funds being wired? If so, advanced preparation will be required.

If you answered "YES" to any of these questions, please contact your Escrow Officer for further information.

- Y N Is the buyer prepared to provide certified funds at the close of escrow?
- Y N Do all parties signing documents have a valid photo I.D.?

NOTE: If "NO", now is the time to apply for a valid I.D.

Contact me today for **instant access** to information about how we can make your transaction a success.

**Trusted everywhere,
every day.**