

Agent's Escrow Checklist

Consider the following list to expedite the escrow process

Please take a moment to provide the following information. This will assist in a faster and smoother escrow process.

How would the buyers like to take title?

Contact us today for information on common ways to take title

What is the correct spelling and full name of the buyers(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 Seller or Buyer is a trust entity, submit a copy of the trust agreement and a signed verification of trustee.

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 on 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 is required.

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

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.?

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