

**SELLER'S ATTORNEY CHECKLIST**

Client's Name \_\_\_\_\_ Home # \_\_\_\_\_  
Cell # \_\_\_\_\_

Social Security # \_\_\_\_\_ Social Security # \_\_\_\_\_

Marital Status: Married ( ) Single( ) Divorced( ) (copy of divorce decree if any)

PROPERTY ADDRESS: \_\_\_\_\_

Purchase Price \_\_\_\_\_ Finance Amount \_\_\_\_\_

Lender Name \_\_\_\_\_ Contact Person \_\_\_\_\_

Realtor Information Listing Co. \_\_\_\_\_

Phone # \_\_\_\_\_ Phone # \_\_\_\_\_

Agents Name \_\_\_\_\_ Agents Name \_\_\_\_\_

Request following information from Seller: (to complete preparation of contract)

- |   |        |       |
|---|--------|-------|
| <input type="checkbox"/> Realtor's Listing Agreement                    | Yes( ) | No( ) |
| <input type="checkbox"/> Survey Available                               | Yes( ) | No( ) |
| <input type="checkbox"/> Prior title report                             | Yes( ) | No( ) |
| <input type="checkbox"/> Deed   | Yes( ) | No( ) |
| <input type="checkbox"/> Copies of Certificates of Occupancy/Completion | Yes( ) | No( ) |

■ Review contract with client :

- Send two (2) signed contracts to Purchaser's Attorney \_\_\_\_\_

■ Expiration date for Purchaser's mortgage commitment \_\_\_\_\_

■ Review Title Report: Title # \_\_\_\_\_

- Please include this number when speaking with or sending papers to title company.

- |   |            |
|---|------------|
| <input type="checkbox"/> Clear any title Objections | Date _____ |
| <input type="checkbox"/> Order Payoff Letters       | Date _____ |

■ Closing Date \_\_\_\_\_

- Advise Clients
- Mortgage payoff letters
- Final Water and Fuel Oil readings
- Prepare Deed
- Transfer Tax forms (ACRIS for New York City / PREP for Westchester)
- Power of Attorney (if any)
- Purchase Money Mortgage (if any)

- Send closing statement and relevant copies of closing documents to client

### PURCHASER'S ATTORNEY CHECKLIST

Client's Name \_\_\_\_\_ Home # \_\_\_\_\_  
Cell # \_\_\_\_\_

Present Address \_\_\_\_\_

Property Being Purchased \_\_\_\_\_

Social Security # \_\_\_\_\_ Social Security # \_\_\_\_\_

Advise client to have home inspected by engineer for possible defects

Review report when received

Review contract terms with client and send signed contracts to seller's attorney \_\_\_\_\_

Order termite inspection \_\_\_\_\_

Expiration date for Seller's attorney to receive termite report. \_\_\_\_\_

#### Mortgage

Mortgage Application made to \_\_\_\_\_ Mortgagee on \_\_\_\_\_

Mortgage Commitment received from \_\_\_\_\_ on \_\_\_\_\_

Expiration date for Purchaser's Mortgage Commitment \_\_\_\_\_

Title Insurance Title # \_\_\_\_\_ (Please use this number when speaking with or sending papers to the title company)

Order Title Report with Title Company (Name) \_\_\_\_\_

Request report mailed to Sellers' Attorney (Name) \_\_\_\_\_

Request report mailed to Mortgagee (Name) \_\_\_\_\_

Departmental & Certificate of Occupancy for premises and additions

Searches (Taxes and Municipals) \_\_\_\_\_

Clear Title Objections (if any) on Objections # \_\_\_\_\_

Review Objections with Seller's Attorney on Objections # \_\_\_\_\_

Survey or Survey Inspection based on Existing Survey ordered on \_\_\_\_\_

#### Closing Date \_\_\_\_\_

Advise Client

Advise Title Company

Review Deed, marked up title report and other documents at closing

#### Documents to be mailed to Client

Closing Statement and relevant copies of closing documents Date \_\_\_\_\_

Send original recorded Deed and Title Policy Date \_\_\_\_\_

