



REITITLE

KEYS TO A SMOOTH AND SECURE CLOSING

1. Opening Title:

1. Put the property address in subject line
2. Remember to cc your team members and always “reply all”
3. Try to always use the first email to keep everything in one thread
4. Let us know if this a rush file in first email
5. **We will ask you the right questions to get you the right insurance & right protection! There are serious differences for investors!**

2. Purchase Documents:

1. Send purchase contract and all other docs in first email
2. Remember to include all contact information for buyer and seller
3. If there is a mortgage, provide bank name and account number
4. Send addenda as they come up

3. Other Documents: (we also keep these on file for our clients)

1. Certificate of Organization (for LLCs or partnerships)
2. Trust Document (for Trusts, these are specific to each transaction)
3. Wire instructions

4. Property Report:

1. Make sure to review the PR when you get it
2. It will list the true owner of the property, make sure it matches your documents
3. Check for easements or other liens you may not know about
4. Understand your title insurance coverage (see our Keys to Title Insurance)

5. Closing:

1. Bring photo ID & wire instructions if we don't already have on file
2. FYI: Some conventional loans require a second ID
3. Remember wire cut off times are around 3pm
4. We will provide you with printed or electronic copies of your closing documents