

Listing Appointment Checklist for Title

Marital history since acquisition of property

Marriage?

Yes No If yes, spouse's name _____ Date of Marriage _____

Divorce?

Yes No If yes, former spouse's name _____ Date of Divorce _____
County/State _____

Death?

Yes No If yes, please provide copy of Death Certificate.

Is there a Will? Yes No If yes, was it probated? Yes No

How is title held?

Trust, LLC, Corporation, etc?

Yes No If yes, please provide copy of Trust Agreement of LLC/Corporation Documents.

Bankruptcy?

Yes No If yes, County/State _____ Date _____

Party to any lawsuit?

Yes No If yes, please provide details _____

Mortgage Information

Recent Statement?

Yes No If no, please provide Lender's name _____
Phone Number _____
Loan Number _____

Deliquent on payments?

Yes No If yes, how far behind? _____

Existing Survey?

Yes No If yes, is it legible? Yes No
Is it signed? Yes No
Is there a directional Arrow? Yes No

Any changes?

Yes No If yes, please describe the changes and sketch on another copy _____

T-47 Affidavit?

Yes No

Owner's Title Policy?

Yes No

Homeowner's Association

HOA?

Yes No If yes, suggest calling HOA to get information on Resale Certificate and Transfer Fee Charge.
Some HOAs may require a prepayment for a certificate.

Current?

Yes No

How often assessed? Yearly Monthly Quarterly

FIRPTA- Confirmation of US resident as per paragraph 20 in the contract

US Citizen? Yes No

Please note: Title company will follow up and ask for SSN/Tax ID number.