

Pre-Settlement Checklist

There are several important items and documents the title company needs that allow the processing team to get your file ready for settlement. To ensure a timely and efficient closing, make sure you have the following items ready in advance.

Seller Pre-Settlement Items

- Personal Information Sheet
- Mortgage Payoff Authorization Letter
- Second Mortgage Payoff Letters
- Property Tax Information
- Ground Rent Information
- Homeowners Insurance Cancellation
- Homeowners Association Letter
- Original Death Certificate (if applicable)
- Estate Sale (Probate Records)
- Designate Power of Attorney (If applicable)
- Wire Instructions for Proceeds
- Upload Informational Documents to Qualia

Buyer Pre-Settlement Items

- Personal Information Sheet
- Lender Information
- Home Warranty Information
- Homeowners Insurance
- Property Survey
- Designate Power of Attorney (If applicable)
- Submit Earnest Money Deposit (ZOCCAM)
- Wire Instructions for Cash to Close
- Upload Informational Documents to Qualia

Refinance Pre-Settlement Checklist

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- Personal Information Sheet
 - Mortgage Payoff Authorization Letter
 - Ground Rent Information
 - New Lender Information
 - Loan Officer Information
 - Property Tax Information
 - Homeowners Insurance
 - Homeowners Association Letter
 - Wire Instructions for Cash to Close
 - Upload Informational Documents to Qualia

Corporation Purchase Or Sale Pre-Settlement Checklist

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- Personal Information Sheet
 - Articles of Incorporation
 - Operating Agreement
 - Certificate of Good Standing
 - Corporate Resolution Authorizing Signer
 - Submit Earnest Money Deposit (ZOCCAM)
 - Upload Informational Documents to Qualia



Realtor Pre-Settlement Items

- Personal Information Sheet
- Sales Contract
- Buyer Earnest Money Deposit
- Sellers Contribution Information
- Commission Sheet
- Administration Fee
- Termite Paperwork
- Property Survey
- Home Warranty Information
- Broker Disbursement Instructions
- Upload Informational Documents to Qualia