

## **Sample Outline**

	<u>Agent</u>	<u>Buyer</u>	<u>Seller</u>	<u>Attorney</u>
<b>Arranging a Closing</b>				
1) Real Estate Agent provides contract for buyer and seller to sign showing agreement to purchase.	x	x	x	
2) Agent sends contract to attorney and schedules a closing date.	x			
3) Attorney arranges title search				x
4) Attorney obtains property tax information				x
5) Attorney sends <u>Listing Agent Information Sheet</u> and <u>Buyer's Agent Information Sheet</u> to Agents to complete with their clients.	x	x	x	x
<b>Before the Closing</b>				
6) Request Payoffs for Mortgages and Equity Lines			x	x
7) Prepare Deed and Lien Waiver				x
8) Prepare loan documents				x
9) Arrange inspections and appraisals	x			
10) Secure loan and homeowners insurance		x		
11) Provide invoices for repairs, etc. to attorney	x			
12) Confirm homeowners association dues				x
<b>The Closing</b>				
13) Prepare Settlement Statement (HUD)				x
14) Sign documents		x	x	x
15) Notarize loan package				x
16) Collect all funds associated with closing				x
<b>After the Closing</b>				
16) Record Deed at Register's Office				x
17) Mail loan package to lender				x
18) Disperse funds to appropriate payees				x
19) Finalize Title Policy				x

For more detailed information, please refer to our article [Letter to Real Estate Clients](#), or [contact](#) a member of our experienced staff for assistance.