






# TITLE COMPANY CHECKLIST

*What you can do to help your title company provide your clients a smooth closing every time*

-  **Review & respond to all communications you receive**  
You'll receive emails from our automation and our team personally, both including or requesting important information or review. Make sure you review all communications and respond in a timely manner.
-  **Fill out your Real Estate Agent Form completely**  
One of the first automated emails you'll receive is an "Order Confirmation" with a request to complete and send us your Real Estate Agent form with the necessary information for the closing. Fill this form out completely before submitting it to avoid delays from missing information.
-  **Let us know if your clients won't be at closing**  
We are happy to facilitate a remote closing, and by letting us know as soon as possible, we can avoid any unnecessary delays.
-  **Provide necessary documents & info as soon as possible**  
If you have documents that you know will be needed later on, provide them as soon as possible. This includes but is not limited to payoffs, business documents (Operating Agreement, Articles of Organization, Resolutions), Home Warranty invoices, HOA contact info, etc.
-  **Let us know if you have any questions or concerns**  
We all have the common goal of getting your clients to closing with as few issues as possible. Open communication is key in ensuring this so let us know if you have any questions or concerns at any point throughout the process.



VISIT OUR WEBSITE  
TO LEARN MORE



*We Say Yes!*

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