

# REC� Title & Escrow Checklist

Use this checklist to ensure all title and escrow steps are managed seamlessly by the REC� concierge.

## 1. Title Search & Clearance

- ☐ Order comprehensive title search
- ☐ Review title search report for liens, encumbrances
- ☐ Resolve any title defects with appropriate parties
- ☐ Procure title insurance for buyer and lender

## 2. Document Preparation

- ☐ Collect seller disclosures and affidavits
- ☐ Prepare deed and legal transfer documents
- ☐ Coordinate payoff letters for existing loans
- ☐ Generate closing statements with itemized fees

## 3. Escrow Setup

- ☐ Open escrow account with title company
- ☐ Deposit earnest money into escrow
- ☐ Confirm escrow instructions with all parties
- ☐ Verify beneficiary statements and payoffs

## 4. Coordination & Communication

- ☐ Schedule signing appointments for buyer and seller
- ☐ Provide document packages to signing agents
- ☐ Arrange courier or e-sign delivery of documents
- ☐ Send reminders and confirm appointments

## 5. Closing & Funding

- ☐ Review final closing statement for accuracy
- ☐ Collect signatures and notarizations
- ☐ Confirm fund transfer instructions
- ☐ Release funds and record deed/title

## 6. Post-Closing Tasks

- ☐ Record final documents with county recorder
- ☐ Disburse funds to seller, agents, and payoffs
- ☐ Provide final statement copies to all parties
- ☐ Archive transaction files and update CRM

*Download this checklist and collaborate with your RECN concierge for error-free title and escrow coordination.*