

# Escrow Opening Checklist

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## Initial Setup & Client Information

Gather essential client details and establish the foundational aspects of the escrow.

### Escrow Officer

- Escrow Officer 1
- Escrow Officer 2
- Escrow Officer 3

### Client Name (Buyer)

Write something...



### Client Name (Seller)

Write something...

### Client Contact Information (Buyer - Phone, Email, Address)

Write something...

### Client Contact Information (Seller - Phone, Email, Address)

Write something...

### Communication Preference (Buyer)

- Email
- Phone
- Text

### Communication Preference (Seller)

- Email
- Phone
- Text

### Date Client Instructions Received

Enter date...

# Property Information & Legal Description

Verify details about the property being transferred, including legal descriptions and address confirmation.

## Property Address

Write something...

## Parcel Number(s)

Write something...

## Legal Description (Full)

Write something...

## Lot Size (Acres/Square Feet)

Enter a number...

### Property Survey (if available)

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### Property Type

- Single Family Residence
- Condominium
- Townhouse
- Land
- Multi-Family
- Commercial

### APN (Assessor's Parcel Number)

Write something...

## Parties & Contact Information

Confirm identities and contact information for all involved parties: Buyer, Seller, Real Estate Agents, Lenders, Title Company, etc.

### Buyer Full Name

Write something...

**Buyer Phone Number**

Write something...

**Buyer Email Address**

Write something...

**Seller Full Name**

Write something...

**Seller Phone Number**

Write something...

**Seller Email Address**

Write something...

**Listing Agent Full Name**

Write something...

### **Listing Agent Phone Number**

Write something...

### **Listing Agent Email Address**

Write something...

### **Buyer's Agent Full Name**

Write something...

### **Buyer's Agent Phone Number**

Write something...

### **Buyer's Agent Email Address**

Write something...

## **Purchase Agreement Review**

Thoroughly review the Purchase Agreement for key dates, contingencies, and special instructions.

### **Review Purchase Agreement - General Comments & Summary**

Write something...

**Effective Date of Purchase Agreement**

Enter date...

**Closing Date (as per Purchase Agreement)**

Enter date...

**Purchase Price (as per Purchase Agreement)**

Enter a number...

**Contingency Types (Select all that apply)**

- Financing
- Appraisal
- Inspection
- Sale of Buyer's Property
- Other (Specify)

**Summary of Inspection Contingency Details (if applicable)**

Write something...

### Summary of Appraisal Contingency Details (if applicable)

Write something...

### Earnest Money Deposit Amount Specified?

Yes

No

### Special Instructions/Riders/Addenda (Summarize)

Write something...

## Funding & Loan Information

Collect and verify loan details, funding sources, and lender requirements.

### Loan Amount

Enter a number...

### Lender Name

Write something...

### Loan Officer Name

Write something...

### Loan Type (e.g., Conventional, FHA, VA)

Conventional

FHA

VA

USDA

Jumbo

### Estimated Closing Date (per Loan Commitment)

Enter date...

### Interest Rate (per Loan Commitment)

Enter a number...

### Loan Commitment Details/Conditions (if applicable)

Write something...

## Loan Estimate (LE)

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## Funding Type

Wires

Check

# Title & Insurance

Initiate title search and order necessary title insurance policies.

## Title Company Selection

Company A

Company B

Company C

Other - Specify

## Title Company Order Instructions/Special Requests

Write something...

**Title Insurance Type (Standard, Extended, etc.)**

- Standard
- Extended
- Custom - Specify

**Estimated Title Insurance Premium (if known)**

Enter a number...

**Date Title Search Ordered**

Enter date...

**Flood Certification Required?**

- Yes
- No

**Copy of Preliminary Title Report (if available)**

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**Endorsements Required?**

- Yes
- No

# Initial Deposits & Funds

Collect initial deposits and establish fund handling procedures.

## Initial Deposit Amount

## Source of Initial Deposit (e.g., Bank Name)

## Deposit Account Number

## Deposit Date

## Confirmation Number (if applicable)

### **Earnest Money Deposit Amount**

### **Method of Earnest Money Deposit (e.g., Wire Transfer, Check)**

### **Copy of Deposit Confirmation (if available)**

 Upload File

## **Escrow Fees & Disclosures**

Clearly outline escrow fees and provide required disclosures to all parties.

### **Escrow Fee Breakdown Explanation**

### **Escrow Fee Amount**

### Earnest Money Deposit Amount

Enter a number...

### Payment Method for Initial Deposit

- Check
- Wire Transfer
- Credit Card (with fee)

### Copy of Initial Deposit Receipt (if applicable)

 Upload File

### Disclosure of Potential Conflicts of Interest (if any)

- No Conflicts
- Conflicts Exist - Documented and Disclosed

### Summary of Key Disclosures Provided to Parties

Write something...

### Date Disclosures Provided to All Parties

Enter date...