



Escrow Opening Checklist

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)

 Upload File

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)

 Upload File

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)

 Upload File

Endorsements Required?

Yes

No

Initial Deposits & Funds

Collect initial deposits and establish fund handling procedures.

Initial Deposit Amount

Enter a number...

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

Write something...

Deposit Account Number

Write something...

Deposit Date

Enter date...

Confirmation Number (if applicable)

Write something...


Earnest Money Deposit Amount

Enter a number...

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

Write something...

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

Write something...

Escrow Fee Amount

Enter a number...

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...