



Post-Closing Follow-Up Checklist

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Client Communication & Satisfaction

Ensuring the client has a positive post-closing experience and addressing any immediate concerns.

Date of Follow-Up Call/Email

Enter date...

Client Satisfaction Level (Initial Contact)

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied



Notes from Follow-Up Conversation/Email

Write something...

Were there any immediate issues or questions?

☐ Yes

☐ No

Details of Issues/Questions (if any)

Write something...

Issue Resolution Status

☐ Resolved

☐ In Progress

☐ Pending Further Action

Date Issue Resolved (if applicable)

Enter date...

Contact Person for Follow-Up (if needed)

Write something...

Document Management & Storage

Organizing and securely storing all closing documents for future reference and compliance.

Closing Statement (HUD-1/ALTA)

 Upload File

Promissory Note (if applicable)

 Upload File

Mortgage/Deed of Trust (if applicable)

 Upload File

Summary of Key Closing Documents

Write something...

Date Documents Digitized/Scanned

Enter date...

Notes on Document Storage Location (Physical & Digital)

Write something...

Document Storage Method

- ☐ Cloud Storage
- ☐ Physical Filing Cabinet
- ☐ Hybrid (Cloud & Physical)

Number of Physical Pages Filed (if applicable)

Enter a number...

Financial Reconciliation & Reporting

Verifying financial accuracy, distributing funds, and fulfilling reporting obligations.

Verify Closing Statement Accuracy

Enter a number...

Funds Disbursed to Escrow Account?

- ☐ Yes
- ☐ No

Confirm Payout to Lender (If Applicable)

Enter a number...

Confirm Payout to Seller (If Applicable)

Enter a number...

Date Funds Disbursed

Enter date...

Notes on Financial Reconciliation

Write something...

Property Tax Proration Correct?

☐ Yes

☐ No

HOA Fees Proration Correct?

☐ Yes

☐ No

Property Matters & Vendor Coordination

Addressing property-related tasks, coordinating with vendors (e.g., insurance, utilities), and ensuring a smooth transition.

Confirm Utility Transfer Completion Date

Insurance Binder Received?

- ☐ Yes
- ☐ No
- ☐ Pending

Which Utilities Have Been Transferred?

- ☐ Electricity
- ☐ Gas
- ☐ Water
- ☐ Trash
- ☐ Internet
- ☐ Cable

Confirm Remaining Balance for Property Taxes (If Applicable)

Notes Regarding Property Transfer & Vendor Coordination

Write something...

HOA Information Provided to Client?

☐ Yes

☐ No

Upload HOA Documents (if applicable)

 Upload File

Legal & Regulatory Compliance

Confirming adherence to all applicable laws, regulations, and contractual obligations.

Record Date of Title Insurance Policy Recording

Enter date...

Confirm Recording of Mortgage/Deed of Trust

☐ Recorded

☐ Not Yet Recorded

☐ Pending

Recordation Fees Paid (if applicable)

Enter a number...

Notes on Any Recording Issues or Delays

Write something...

Confirm Escrow Account Setup & Funding (if applicable)

- ☐ Completed
- ☐ In Progress
- ☐ Not Applicable

Notes on Compliance with State-Specific Disclosures (e.g., Seller's Property Disclosure)

Write something...

Upload Copy of Recorded Deed & Mortgage (if available)

 Upload File

Verify Compliance with Anti-Money Laundering (AML) requirements

- ☐ Completed
- ☐ Review Needed

Internal Team Follow-Up

Ensuring all internal team members have completed their post-closing tasks and have the necessary information.

Date of Final Team Debriefing

Enter date...

Summary of Team Debriefing Notes (Key Takeaways, Issues, Improvements)

Write something...

Escrow Officer Feedback (Positive/Neutral/Needs Improvement)

- ☐ Positive
- ☐ Neutral
- ☐ Needs Improvement

Time Spent on Post-Closing Tasks (in hours)

Enter a number...

Potential Areas for Process Improvement Identified

- ☐ Communication
- ☐ Document Handling
- ☐ Coordination with Vendors
- ☐ Data Entry Accuracy
- ☐ Client Updates

Assigned Follow-up Tasks (Brief Description)

Write something...

Deadline for Assigned Follow-up Tasks

Enter date...