

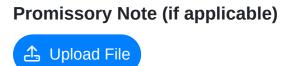
Post-Closing Follow-up Checklist

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	
ocument Management & Storage	
ganizing and securely storing all closing documents for future reference an impliance.	d
Closing Statement (HUD-1/ALTA)	
♣ Upload File	



Mortgage/Deed of Trust (if applicable) L 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 comething
Write something
Property Tax Proration Correct?
Yes
∐ No

HOA Fees Proration Co	orrect?
	rs & Vendor Coordination d tasks, coordinating with vendors (e.g., insurance, utilities), nsition.
Confirm Utility Transfe	r Completion Date
Enter date	
Insurance Binder Rece	eived?
Yes	
☐ No ☐ Pending	
Which Utilities Have B	een Transferred?
☐ Electricity	
☐ Gas ☐ Water	
☐ Trash	
☐ Internet	
Cable	
Confirm Remaining Ba	llance for Property Taxes (If Applicable)
Enter a number	

otes Regarding Property Transfer & Vendor Coordination
Write something
OA Information Provided to Client?
Yes
_ No
pload HOA Documents (if applicable)
gal & Regulatory Compliance
gal & Regulatory Compliance firming adherence to all applicable laws, regulations, and contractual obligations.
firming adherence to all applicable laws, regulations, and contractual obligations.
firming adherence to all applicable laws, regulations, and contractual obligations. Lecord Date of Title Insurance Policy Recording
firming adherence to all applicable laws, regulations, and contractual obligations. ecord Date of Title Insurance Policy Recording Enter date confirm Recording of Mortgage/Deed of Trust
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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 Proper Disclosure) Write something	erty
Upload Copy of Recorded Deed & Mortgage (if available) Lucipional 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.

Enter date	
Summary of Team Debri	efing Notes (Key Takeaways, Issues, Improvements)
Write something	
Ecorow Officer Foodback	k (Positivo/Noutral/Noods Improvement)
Positive	k (Positive/Neutral/Needs Improvement)
Neutral	
Needs Improvement	
Time Spent on Post-Clos	sing Tasks (in hours)
Enter a number	sing Tasks (in hours)
Enter a number	ess Improvement Identified
Enter a number	
Enter a number Potential Areas for Proce	
Enter a number Potential Areas for Proce	ess Improvement Identified
Potential Areas for Proce Communication Document Handling	ess Improvement Identified
Potential Areas for Proce Communication Document Handling Coordination with Vendors	ess Improvement Identified
Enter a number Potential Areas for Proce Communication Document Handling Coordination with Vendors Data Entry Accuracy	ess Improvement Identified

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