



Title Search & Insurance Checklist

 Show only Checklist

Display Style
Default 

Initial Client Consultation & Information Gathering

Gathering essential client information and setting expectations regarding title search and insurance.

Client Name

Write something...

Property Address

Write something...



Purchase Price

Enter a number...

Loan Type (if applicable)

- ☐ Conventional
- ☐ FHA
- ☐ VA
- ☐ USDA
- ☐ Cash

Estimated Closing Date

Enter date...

Client Expectations & Concerns (Regarding Title)

Write something...

Desired Title Insurance Coverage Level

- ☐ Standard
- ☐ Extended
- ☐ Basic

Existing Title Documents (if applicable)

 Upload File

Ordering the Title Search

Initiating the title search process with the title company and providing necessary documentation.

Property Address

Write something...

Parcel Number (APN)

Enter a number...

Title Company Selection

- ☐ Company A
- ☐ Company B
- ☐ Company C
- ☐ Other (Specify)

Special Instructions for Title Search (e.g., specific historical periods to investigate)

Write something...

Effective Date of Title Search (if specific date is needed)

Deed or Existing Title Document (if available)

 Upload File

Ordering Agent Name

Ordering Agent Email

Title Search Review & Examination

Thoroughly reviewing the title search results for potential issues and encumbrances.

Review Search Report for Accuracy of Legal Description

Verify Owner(s) Name(s) Match Legal Documents

Write something...

Identify Potential Encumbrances (Select all that apply)

- ☐ Mortgages
- ☐ Liens
- ☐ Easements
- ☐ Judgments
- ☐ Taxes
- ☐ Restrictive Covenants
- ☐ Other (Specify in Long Text)

Note any discrepancies or red flags observed in the report

Write something...

Year of Original Deed (if available)

Enter a number...

Type of Title Search Performed

- ☐ Preliminary
- ☐ Extended
- ☐ Other (Specify in Long Text)

Summarize findings related to any potential title defects

Write something...

Title Commitment Review & Negotiation

Reviewing the preliminary title commitment, identifying exceptions, and negotiating with the title company.

Review Title Commitment Exceptions - Describe each exception and its potential impact.

Write something...

Exception Type Classification

- ☐ Curable
- ☐ Non-Curable
- ☐ Minor/Acceptable
- ☐ Requires Further Investigation

Proposed Solutions/Negotiation Points with Title Company

Write something...

Estimated Cost of Exception Resolution (if applicable)

Enter a number...

Which exceptions require negotiation?

- ☐ Liens
- ☐ Easements
- ☐ Encroachments
- ☐ Judgments
- ☐ Mechanic's Liens
- ☐ Other - Specify in Long Text

Detailed notes regarding communication with the title company

Write something...

Date of initial title commitment review

Enter date...

Title Insurance Policy Selection & Application

Choosing the appropriate title insurance policy and completing the application process.

Policy Type (Owner's/Lender's)

- ☐ Owner's Policy
- ☐ Lender's Policy
- ☐ Both

Coverage Amount (Insured Value)

Enter a number...

Endorsement Options (if applicable)

- ☐ Standard Endorsements
- ☐ Extended Coverage
- ☐ Specific Endorsement 1
- ☐ Specific Endorsement 2

Special Instructions or Requests for Title Company

Write something...

Claim Recording Service?

- ☐ Yes
- ☐ No

Effective Date of Policy (if different from Closing)

Enter date...

Supporting Documents (e.g., Purchase Agreement)

 Upload File

Client Signature (Authorization)

Write something...

Resolution of Title Issues (if any)

Addressing and resolving any title defects, liens, or encumbrances discovered during the search.

Describe the Title Issue Discovered

Write something...

Explanation of Proposed Resolution

Write something...

Resolution Method Chosen

- ☐ Quiet Title Action
- ☐ Lien Release
- ☐ Affidavit of Disclosure
- ☐ Other (Specify Below)

Specify Resolution Details (if 'Other' selected above)

Write something...

Estimated Cost of Resolution (USD)

Enter a number...

Date Resolution Action Initiated

Enter date...

Notes on Communication with Title Company Regarding Resolution

Write something...

Resolution Status

- ☐ Pending
- ☐ In Progress
- ☐ Completed

Date of Resolution Completion (if applicable)

Enter date...

Policy Issuance & Closing

Ensuring the title insurance policy is issued and coordinating with the closing agent.

Scheduled Closing Date

Enter date...

Closing Agent Confirmation Received?

☐ Yes

☐ No

Notes from Closing Agent (regarding title insurance)

Write something...

Premium Amount Confirmed with Client?

☐ Yes

☐ No

Total Premium Amount

Enter a number...

Copy of Final Title Insurance Policy (Uploaded)

 Upload File

Policy Effective Date

Enter date...

Policy Number

Write something...

Post-Closing Review & Follow-Up

Verifying the accuracy of recorded documents and addressing any post-closing issues.

Date of Closing

Policy Number

Was the policy recorded?

☐ Yes☐ No☐ N/A

Date Policy Recorded (if applicable)

Notes regarding recording process or any issues encountered

Were there any post-closing exceptions or claims?

☐ Yes

☐ No

If yes, describe post-closing exceptions or claims and resolution (if any)

Write something...

Client Confirmation Received?

☐ Yes

☐ No

Any client feedback or concerns received?

Write something...