

Seller's Checklist

PRIOR TO CLOSING

- ☐ Provide WFG with current loan, separate payoff, HOA and company information (loan #, lender name and customer service #), so a payoff statement can be ordered from your lender. If your property is subject to dues by homeowners association provide name and phone number of the association or management company.
- ☐ Provide documentation of any change in marital status (divorce, marriage, death) from the time of purchase.
- ☐ If you will be unavailable to execute documents at closing and anticipate someone signing on your behalf by Power of Attorney, you must submit a copy of the proposed Power of Attorney to WFG prior to closing for our review and approval. The original executed Power of Attorney must be provided at closing.
- ☐ Survey with T-47.
- ☐ Forwarding address

REQUIRED AT CLOSING

- ☐ Valid Driver's license or other state or government photo identification.
- ☐ Social security number for 1099 and payoff request.
- ☐ Bring extra house keys, garage door openers, warranties or operational manuals for appliances (heating, AC, stove, etc.) so that your agent is able to transfer to the buyer.

AVOID CLOSING DELAYS

- ☐ The lenders and title insurers require single owners who have married during the course of ownership of the property, to have their spouse join in signing the documents at closing.
- ☐ Cancel your homeowners insurance with your insurance agent only after being notified the transfer has funded. If you are remaining at the property after closing, you should notify your title agent of this change prior to closing.

AFTER CLOSING

- ☐ If you have an electronic draft, you may call and cancel as well as provide your forwarding address. Your lender will refund all monies left in your escrow account approximately 15 to 30 business days after they receive the payoff funds. Typically, the lender will mail a package containing your original promissory note marked "PAID" and other loan file documents. Retain these for future reference. They may also include a release of lien document. This document needs to be recorded with the county clerk's office to remove the lien of record.
- ☐ Your closing statement serves as a substitute form 1099 for tax purposes so provide a copy to your CPA