

145 Union Street South
Suite 106
Concord, NC 28025

5457 Monroe Rd.
Suite A
Charlotte, NC 28212

211 N. Main Street
Suite C
Monroe, NC 28112

PURCHASE PRE-CLOSING WORKSHEET

FILE NAME: _____ Judgments No Judgments

PROPERTY ADDRESS: _____

CLOSING DATE: _____ 1099: YES / NO

CLOSING TYPE: PURCHASE ASSUMPTION CONSTRUCTION

2ND MORTGAGE EQUITY LINESALE REFINANCE

Is there Secondary Financing? YES / NO

If yes, who has Secondary mortgage? _____

PURCHASERS:

SELLERS:

1.) _____

1.) _____

Phone #: _____

Phone #: _____

2.) _____

2.) _____

Phone #: _____

Phone #: _____

REALTORS:

LISTING AGENT: _____

SELLING AGENT: _____

ADDRESS: _____

ADDRESS: _____

PHONE #: _____ FAX #: _____

PHONE #: _____ FAX #: _____

E-MAIL: _____

E-MAIL: _____

LOAN OFFICER:

NAME: _____

PHONE #: _____

FAX #: _____

E-MAIL: _____

MORTGAGE COMPANY: _____

- Pending Assessment
- Prior Policy
- Real Estate Agent Forms
- Title Request
- Commitment
- Title Docs
- Seller Docs
- Pay Off

- HOA Dues
- Closing Package & Instructions
- Funding Docs
- Recorded
- Package Sent
- Final Sent
- Checks Sent
- File Scanned

RESPONSIBLE ATTORNEY: _____