

Real Estate Closing Checklist

1. CLIENT INFORMATION

Client Name:

New Direction Account Number:

2. REAL ESTATE CLOSING INFORMATION

Property Address:

City:

State:

Zip:

Closing Date: (MM/DD/YYYY)

Closing Time:

Title Company:

Closer Name:

Phone Number(s):

Fax Number:

Email Address:

How will closing documents be provided to New Direction?

Email Fax Regular Mail Express Mail

How does the title company require signed documents back?

Email Fax Regular Mail Express Mail

3. CLOSING DOCUMENT INFORMATION (Check each box that applies to your closing indicating you have the following documents.)

- HUD (signed as "Read and Approved")
- Settlement Statement (signed as "Read and Approved")
- Closing Documents [Anything Requiring Buyer's Signature] (signed as "Read and Approved")
- Loan Documents (signed as "Read and Approved")
- PAL – Completed & Signed [For Mortgage Payments] (signed as "Read and Approved")

4. REAL ESTATE CLOSING ACKNOWLEDGEMENT (Initial all items in the spaces provided.)

_____ I understand that in order to close and fund this transaction on the closing date indicated above, all closing documents requiring the "buyer's" signature must be received by New Direction Trust Company no later than 3 business days prior to the closing.

_____ I understand that it is my responsibility to review all closing and loan documents for accuracy.

_____ I understand that I must indicate my approval by writing "Read and Approved" and signing my name in the MARGINS of the closing documents.

_____ I understand that the closing on the property being purchased by my IRA is dependent upon New Direction receiving the "Read and Approved" documents listed below by the date and time indicated above.

_____ I understand that failure to provide the documents to New Direction Trust Company on time will delay the closing.