

SELLER CHECKLIST ✓

This checklist is designed to guide you through your **closing process** with Sherman & Phalen. Please contact your assigned paralegal with any questions.

BEFORE CLOSING			
1	Communicate with our office	The paralegal assigned to your closing will send you an email to complete the Seller Information Form. This provides us with critical information to complete the closing. We'll also need your cooperation to obtain payoffs for mortgages or other liens.	<input type="radio"/>
2	Special Circumstances	We'll need additional information if: <ul style="list-style-type: none"> • someone on title is deceased, • there has been a name change or divorce, or • the property is tenant-occupied. 	<input type="radio"/>
3	HOA	Provide us with the name and contact info for any HOA or Condo Association for your property. While the contract usually requires the seller to pay for any HOA statement of account, we will help you order the letter.	<input type="radio"/>
4	Identity Verification	Please work with our office to complete any required ID verification.	<input type="radio"/>
5	Repair invoices	If Sherman & Phalen is required to collect funds for repair items under the contract, please deliver the invoices to us as soon as possible	<input type="radio"/>
6	Schedule your closing	Our office will contact you to schedule the closing. Please let your paralegal know if you can't attend the closing in person so that we can discuss other arrangements.	<input type="radio"/>
7	Arrange any required funding	If you're required to bring funds to closing, we accept the following payments: <ul style="list-style-type: none"> • Payments up to \$2,000: Personal checks accepted at closing. • Amounts above \$2,000 to \$5,000: Cashier's Check issued by a local or national bank or credit union accepted. Can bring to closing. • Amounts above \$5,000: Must be paid by wire transfer. 	<input type="radio"/>

NOTE: Due to high levels of fraud, we require you to verify our wire instructions with a phone call—not an email—to our office. Disregard any "updated" wire instructions. **(770-579-0109)**



DAY OF CLOSING

1	Provide your banking information	If you would like a wire transfer for your proceeds, please provide us with your banking information, including: bank name, routing number, account number, and your address as shown on the account. You'll verify your wire instructions at closing to prevent fraudulent transfers.	<input type="radio"/>
2	Bring your photo identification	This is required! You can provide a driver's license, state-issued identification card, or passport.	<input type="radio"/>
3	Provide your social security number	Your SSN is required so we can complete certain tax documents such as a 1099 and Affidavit of Residency.	<input type="radio"/>
4	Original POA	If you have a pre-approved Power of Attorney, you must bring the original POA to the closing.	<input type="radio"/>
5	Keys	Bring all property-related items for the new owners, such as keys, garage remotes, and security system codes.	<input type="radio"/>

AFTER CLOSING

6	Cancel payments	Cancel automatic payments for your old mortgage.	<input type="radio"/>
7	Maintain your paperwork	We save paper when possible and can scan you a copy of your closing paperwork unless you request a hard copy. At the closing, however, we will provide you with a hard copy of your settlement statement and 1099 for your taxes.	<input type="radio"/>

We're here to make this process as smooth as possible—don't hesitate to reach out to us if you need assistance.

[Contact Us](#)