

Real Estate Closing Intake Sheet

Ament Law Group, P.C. — Buyer / Seller / FSBO

Fill in what you have — we will contact you with any questions.

Your Information

First Name

Last Name

Phone (best)

Email

Current mailing address

Transaction Type

I am the Buyer

I am the Seller

FSBO (selling without an agent)

Residential

Commercial

Land / Vacant Lot

Property

Property address (full — including county)

Purchase / sale price

Anticipated closing date

Primary residence, investment property, or vacation home?

For Buyers

Lender name

Loan officer / contact

Conventional

FHA

VA

USDA

Cash (no mortgage)

Pre-approved?

Loan amount (approx.)

Selling another property to fund this purchase?

For Sellers

Mortgage company

Approximate payoff balance

Liens on the property?

HOA? (name / contact)

Anyone else on the deed who needs to sign?

Agreement of Sale

Signed agreement in place

Under negotiation

No agreement yet

Buyer's / Seller's agent (name and brokerage, if any)

Contingencies we should know about (inspection, financing, sale of home)?

Title Insurance

Buyer wants owner's policy

Lender requires lender's policy

Cash sale — no lender policy needed

Notes

Anything else we should know
