

Subject-To Check List

ADDRESS: _____

CONTACT: _____

PHONE #: _____

1st Mortgage Co. _____ 2nd Mortgage Co. _____

1st Mortgage Co. Phone: _____ 2nd Mortgage Co. Phone: _____

1st Mortgage Amount _____ 2nd Mortgage Amount _____

1st Mortgage Loan # _____ 2nd Mortgage Loan # _____

Projected Take over Date: _____

- ☐ Create Owner Folder for this home – Digital or Physical
- ☐ Order Pre-Title Work
 - ☐ Check if Taxes are Paid
 - ☐ Check IRS/state tax liens
- ☐ Check status of mortgage(s)
- ☐ Prep Documents: Offer to Purchase, Warranty Deed/Land Trust (title), Seller's Acknowledgements, Affidavit of Liens, Bill of Sale, Limited Power of Attorney, Notice to Mortgage Company, Seller's (Real Estate) Disclosure, Lead Based Paint Disclosure
- ☐ Get a Key or Access for inspection and showings
- ☐ Set up Utilities if applicable
- ☐ Water Reading (if City H2O)
- ☐ Water Softener (if well /rental?)
- ☐ Set up Insurance Policy
 - ☐ Name Lender(s) as additional insured
- ☐ Review Title Work
- ☐ Home Inspection, water, septic, insects, _____
- ☐ Sign All Documents, get copy of driver's license and DOB
 - ☐ Close with Title Insurance
- ☐ Advertise the home: flyers, REIA, Buyers list, Internet
- ☐ Record Deed and/or Land Trust
- ☐ Bring Mortgage(s) current?
- ☐ Set up Auto-payments if paying mortgage payment
- ☐ Maintenance/Work to Be Completed
 - ☐ _____
 - ☐ _____
 - ☐ _____