

Listing Appointment Checklist



Marital History Since Acquisition of Property?

- Marriage Status of Seller:
 - ☐ Single
 - ☐ Married
 - ☐ Divorced
 - ☐ Widow/Widower
- If married, before or after the purchase of subject property?
 - ☐ Before
 - ☐ After
- If divorced since purchase of property..
 - Name of ex-spouse: _____
 - County/State: _____
- If widowed since purchase of property...
 - Name of deceased spouse: _____
 - Date of Death: ____/____/____
 - County of Death: _____
 - Did spouse leave a will? Y N
 - Was the will probated? Y N

How is Title Held?

- Does this property involve a trust, LLC, Corp., etc.?
 - ☐ No
 - ☐ Yes - If yes, need copy of Trust Agreement or LLC/ Corp. Documents.

Bankruptcy?

- ☐ No
- ☐ Yes - If yes, County/State: _____
- Date ____/____/____

Party to any Lawsuit?

- ☐ No
- ☐ Yes - If yes, please provide details _____

Mortgage Info?

- 1st Lien Holder Contact Information and Loan Number
 - Name: _____
 - Phone Number: _____
 - Loan Number: _____
- 2nd Lien Holder Contact Information and Loan Number
 - Name: _____
 - Phone Number: _____
 - Loan Number: _____

- Are you current with your loan payments?
 - ☐ No
 - ☐ Yes - If yes, how far behind? _____
- Are there any unpaid judgements against you?
 - ☐ No
 - ☐ Yes - If yes, provide date of judgement, name of creditor and amount of each judgement:

- If there are mineral rights did you retain them?

- ☐ No
- ☐ Yes

- Do you owe past due property taxes or past due Federal or State taxes?

- ☐ No
- ☐ Yes

Existing Survey?

- ☐ No
- ☐ Yes - If yes, is it legible? Y N

- Any changes?

- ☐ No
- ☐ Yes - If yes, describe changes and sketch on another copy _____

Owners Title Policy?

- ☐ No
- ☐ Yes

Home Owners Association?

- ☐ No
- ☐ Yes - If yes, suggest calling HOA to get information on Resale Certificate and Transfer Fee Charge.

Name of HOA: _____

Phone Number: _____

Power of Attorney?

- ☐ No
- ☐ Yes

Request to Open Title Signed?

- ☐ No
- ☐ Yes