

Title & closing coordination guide.

A starting framework for the mortgage professional and closing team. Use your institution's instructions and the requirements for the particular loan.

At title order.

- ☐ Provide the property, loan purpose and target closing date.
- ☐ Identify the borrower and lender contacts.
- ☐ Provide the lender's required title-order instructions.
- ☐ Confirm the channel for private documents.

During coordination.

- ☐ Review commitment and applicable CPL requirements.
- ☐ Address existing financing and payoff documentation.
- ☐ Share changes to loan terms, dates or instructions.
- ☐ Coordinate settlement figures and document delivery.

At closing and afterward.

- ☐ Confirm the signing method and document requirements.
- ☐ Communicate funding authorization and disbursement conditions.
- ☐ Coordinate recording and document return.
- ☐ Track any remaining post-closing requirements.

General preparation guidance. Follow your contract and transaction-specific instructions. Consult the appropriate professional for legal, tax or coverage questions. Do not send bank details or confidential records through general website inquiries.