

South Florida investor closing checklist.

Put the structure and important questions in view before the file moves toward closing. Confirm transaction-specific legal and tax matters with your advisors.

Define the transaction.

- ☐ Identify the property and acquisition or sale structure.
- ☐ Confirm cash or financed terms and key contract dates.
- ☐ Identify the buyer, seller and intended signers.
- ☐ Identify counsel, lender and any other specialist involved.

Gather the title and property context.

- ☐ Provide known mortgage and payoff contacts securely.
- ☐ Share available prior title and survey documents.
- ☐ Identify HOA or condominium contacts if relevant.
- ☐ Raise known liens, ownership questions or recording concerns.

Coordinate the close.

- ☐ Agree on the document-delivery and signing plan.
- ☐ Confirm the handling of funds and disbursement conditions.
- ☐ Independently verify any wiring instructions.
- ☐ Track recording and required post-closing documents.

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.