

## MORTGAGE/REFINANCE CHECKLIST

Use this checklist to prepare you for your real estate closing. You' will need to provide information or documents, and have tasks completed a week or more before your closing date to ensure a smooth completion. If you have any questions about your deal, don't hesitate to contact us so we can help you figure it out.

## **INFORMATION/DOCUMENTS REQUIRED**

MORTGAGE STATEMENT(S) FOR ALL REGISTERED MORTGAGES OR LOANS
PROPERTY TAX BILL

RENTAL EQUIPMENT CONTRACTS (if applicable)

STATEMENTS FOR ALL ACCOUNTS TO BE PAID

**UPDATED INSURANCE SHOWING LENDER ON POLICY** 

STATUS CERTIFICATE (condominiums and POTL properties only)

TWO (2) PIECES OF VALID IDENTIFICATION

Note, one must be a picture identification and health cards are not permitted

**OTHER/NOTES:** 

**SIGN UP MEETING:** 

