

INSTRUCTIONS FOR COLONIAL ACRES PHASE V, Inc

MEMBERSHIP OF COPORATION

PROPOSED CLOSING DATE: _____

TRANSACTION CHECKLIST

CLEARVIEW PROPERTY MANAGEMENT SERVICES, LLC & PROFESSIONAL COMPLIANCE SERVICES

SELLERS	Items from the Seller	Listing Agent
	Death certificate/POA or Estate Documents (if applicable)	Name & Address (How commission check is to be cut)
	Copy of Membership Certificate	Closing Agreement
	Agent contract/Sellers Agreement with Agency	Amount of commission % & split
	If requesting DocuSign please provide email	Any other fees being assessed w/explanation *
	Provide YOUR agent with tax history	* Strongly discouraged by BOD
	Provide agent a copy of Bylaws, Articles etc.	
	Provide any liens or mortgages on asset	<i>Visit the website to know what you are seller.</i>

BUYERS	Items from the Buyer	Buyers Agent
	Name of all proposed members w/photo ID	Name & Address (How commission check is to be cut)
	New Member Form	Amount of commission % & split
	Will the certificate be done under a Trust? Provide name	Any other fees being assessed w/explianction *
	Will this be their Homestead?	* Strongly discourage by BOD
	Do they currently claim Homestead in another location?	If buyer is requesting DocuSign provide their email
	Submit Document Acknowledgement form	Go over governing documents with buyers.
Submit Acknowledgement of Responsibility Grid	<i>Visit the website to know what is being purchased.</i>	

CLOSING AGENT	AGENT FOR BOARD OF DIRECTORS	PROFESSIONAL COMPLIANCE SERVICES
	Receive & review all documents	Received wired funds
	Schedule first available date to close & confirm	Cut checks to all parties
	Work up settlement figures, tax proration & wire instructions	Reconcile balance and proceeds
	Forward all to review	
	Complete any changes and compile closing docs	
Perform closing		