

INSTRUCTIONS FOR COLONIAL ACRES PHASE V, Inc

MEMBERSHIP OF COPORATION

PROPOSED CLOSING DATE: (To be set by Closer)

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 selling.</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?	Bring to Closing: Proof of insurance
	Do they currently claim Homestead in another location?	Bring to Closing: Utility transfer confirmation
	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		