



HOME SETTLEMENT CHECKLIST

The
Insurance
Experts.

- _____ Set appointment for home inspection
- _____ Set appointment for radon inspection
- _____ Set appointment for termite inspection
- _____ Received results of home inspection
- _____ Received results of radon inspection
- _____ Submitted addendums regarding inspections (if applicable)
- _____ Signed and received all addendums regarding inspections
- _____ Submitted check for second deposit (amount \$ _____)
- _____ Formalized mortgage application (within 10 days of signing agreement of sale)
- _____ Completed documents sent to mortgage company
- _____ Employment verification received by mortgage company
- _____ Condo documents reviewed, within 5 days of receipt (if applicable)
- _____ Check with mortgage for okay on in-depth credit report
- _____ Order Home Owners insurance - **call Premier Group - 800-220-9798**
- _____ Get estimates from moving companies
- _____ Contract moving company
- _____ Call the realtor _____ to market existing home
- _____ Arrange for transfer of children's school records
- _____ Arrange for temporary housing, if needed
- _____ Arrange for storage of furniture, if needed
- _____ For 'high value' items that are being shipped obtain appraisals and/or gather receipts
- _____ Contact Premier Insurance for auto insurance in new city
- _____ Gather personal records from doctors, dentists, accountants, etc.
- _____ Send out change of address cards to post office, friends, relatives & magazines
- _____ Notify credit card companies and others of your new address.
- _____ Notify utility companies of disconnect date and forwarding address
- _____ Contact new utility companies (gas, phone, electric, water, cable TV) for connection date
- _____ Hold garage sale
- _____ Sort items that you will be taking with you from those that will be shipped with mover
- _____ Call moving company to confirm date and schedule time of pickup
- _____ Transfer bank accounts and safe deposit box contents
- _____ Investigate child care services in your new area, if needed
- _____ Check school schedules and enrollment requirements
- _____ Obtain information for drivers' license and license plate in new state, if applicable
- _____ Select new bank, establish accounts and safe deposit box
- _____ Obtain veterinary records and licenses, get new tags if needed
- _____ Arrange for pet's transportation
- _____ Cancel deliveries and services such as newspapers, trash collection
- _____ Arrange for someone to help watch children and pets on moving date
- _____ Call realtor _____ to request settlement time
- _____ Call realtor _____ for final walk through of property

www.e-premier.com
800-220-9798

Important Contact Information

1. MORTGAGE COMPANY

Name _____
Address: _____
Phone number: _____
Fax number: _____
Contact person: _____
Mortgage commitment date: _____

2. SECOND DEPOSIT

Payable to: _____
Date: _____
Amount: _____
Date delivered: _____

4. TITLE COMPANY

Name: _____
Address: _____
Phone: _____
Fax: _____

5. CONDO Association or Home Owner Association

Name: _____
Phone: _____
Date receiving condo documents: _____

6. MY AGENT

Name: _____
Phone: _____



The Insurance Experts.

www.e-premier.com
800-220-9798