



Real Estate Document Preparatory Checklist

Series III: Real Estate Document Preservation

Step 1: Gather Real Estate Documents

Review the preparatory checklist and gather all related real estate documents for each property.

Step 2: Categorize Real Estate Documents

Sort multiple property locations and complete description label for each property:

- 1st By State
- 2nd By City or County
- 3rd By Property Type
- 4th By Physical or Legal Description

Affix completed description label to document indexing sheet separator.

Real Estate Document Preparatory Checklist:

- Settlement Statement
- Capital Improvement Expense Receipt
- Appraisal
- 100% Assessment Notice
- Property Security System Plan
- Land Use Revalidation Notice
- Sewage Disposal System Certification Letter
- Home Warranty Plan
- Property Insurance Policy
- Personal Property Insurance Policy
- Flood Insurance Policy
- Life Estate Occupancy Agreement
- Real Property Management Agreement
- Tenant Lease Agreement
- Real Estate Deed
- Proprietary Lease and Share of Stock
- Title Report
- Land Survey
- Real Property Inspection Report
- Personal Property Inventory Report
- Purchase and Sale Agreement
- Real Estate Photographs

Step 3: Centralize Real Estate Documents

To start centralizing your real estate documents into our secure, online preservation keepsake box, please call (804) 304-7514.