



The Preparatory Process for Real Estate Preservation Program

**STEP 1:** ‘Gather’ all real estate documents.

**STEP 2:** ‘Categorize’ your documents.

(Sort Multiple Property Locations:)

1<sup>st</sup> by State

2<sup>nd</sup> by City/County

3<sup>rd</sup> by Property Type

4<sup>th</sup> by Physical/Legal Description

**REAL ESTATE DOCUMENT CHECKLIST**

<b>DOCUMENTS</b>	<b>YES or NO?</b>	<b>N/A?</b>	<b>DOCUMENT DATE</b>
Purchase or Sales Agreement			
Appraisal Report			
Deed of Trust			
Certificate of Satisfaction			
Environmental Site Assessments			
Asbestos & Lead Paint & Radon Inspection Report			
Mold & Moisture Inspection Report			
Well & Septic System Inspection Report			
Land Survey or Plat			
Home Inspection Report & Exterior Photo			
Home Warranty Plan			
Wood-Destroying Insect Inspection Report			
Capital Improvement Receipt			
Real Estate Tax Bill			
Notice of Real Estate Assessment			
Land Use Revalidation Notice			
Homeowner’s Association Dues Notice			
Occupancy Agreement			
Property Management Agreement			
Lease Agreement			
Property Maintenance Agreement			
Security System Agreement			
Property & Liability Insurance Policy			
Flood Insurance Policy & Elevation Certificate			
Settlement Statement			
Chain of Title Report & Deed			
Owner’s Policy of Title Insurance			
Proprietary Lease and Share of Stock			

**STEP 3:** After you have *gathered* and *categorized* your real estate documents, please call our Real Estate Transaction Analyst at (804)304-7514 to start *centralizing* into our Preservation Portal.