TITLE & SETTLEMENT / 01

BUILD THE TRANSACTION AND PARTY BRIEF

Give each provider the same privacy-safe transaction context.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Transaction type and property city/state only; do not enter a street address or private file details

Current transaction stage and milestones already reported by the parties or other professionals

Buyer, seller, borrower, or owner roles involved at a high level; no identity details

Lender, agents, attorneys, or other participants by role and expected communication responsibility

Anticipated signing format, access, accessibility, language, travel, or scheduling needs

Decision owner, primary contact role, update preferences, and questions that need a professional answer

Preparation only. Not a title search, insurance recommendation, funds-transfer guide, document interpretation, fee calculation, or real-estate, lending, tax, contract, or legal advice. Keep wire information and private records out.

TITLE & SETTLEMENT / 02

MAP DOCUMENT AND SERVICE CATEGORIES

List categories and requested responsibilities without attaching private records.

Title search, commitment, report, exception, or open-item categories to ask the provider about

Lender-policy and owner-policy questions to discuss separately without choosing coverage here

Settlement or escrow functions, participant coordination, and client actions to define

Loan, closing, disclosure, deed, affidavit, or other document categories expected for secure review

Signing, mobile or remote coordination, identity-check, witness, notary, or access questions

Recording, disbursement confirmation, final statement, policy, file, and post-closing handoff categories

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TITLE & SETTLEMENT / 03

DEFINE SECURITY, CLOSING AND HANDOFF

Ask the provider to propose the process; never place funds instructions here.

- [ ] Wire instructions and account numbers are excluded
- [ ] Credentials, identity files, signatures, and private records are excluded
- [ ] Every transaction participant is identified by role
- [ ] Included work, exclusions, dependencies, and client actions are separated
- [ ] Secure document and funds-instruction communication is provider-defined
- [ ] Title questions and exceptions have an escalation owner
- [ ] Signing, recording, and final-delivery responsibilities are named
- [ ] Provider fees and third-party or transaction-specific charges are separated

Provider-proposed secure intake, identity-check, communication, and funds-instruction confirmation process

How title questions, exceptions, discrepancies, or unresolved items are routed to the appropriate professional

Closing logistics, recording status, final statements, policy or file delivery, and post-closing contacts

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TITLE & SETTLEMENT / 04

QUESTIONS FOR THE SERVICE PROVIDER

Record how this provider would scope, secure, coordinate, and document the work.

Scope: which title, settlement, escrow, document, signing, recording, and delivery tasks are included or excluded?

Roles: who handles each task, which third parties are involved, and which client or professional actions are dependencies?

Security: how are private documents, identities, and funds-instruction communications handled and confirmed?

Exceptions: how are title questions, document discrepancies, changes, and unresolved items escalated?

Milestones: what updates, signing logistics, recording confirmation, final statements, and post-closing files are provided?

Terms: how are fees, third-party charges, assumptions, revisions, cancellation, and handoff documented?

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TITLE & SETTLEMENT / 05

COMPARE WRITTEN SERVICE SCOPES

Use A and B in every box. Clarify differences before choosing.

Provider A / Provider B / proposal dates and transaction-stage assumptions

Title, settlement, escrow, document, signing, recording, delivery, exclusions, and dependencies - A / B

Secure intake, identity and funds-instruction communication, milestones, updates, and escalation - A / B

Provider fees, third-party or transaction-specific charges, revisions, cancellation, written terms, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai if you choose, then start a Title & Settlement Services request so participating pros can compete with proposals. Share only high-level transaction, location, timing, service, and signing needs. Keep wire instructions, credentials, account details, and private records out. Compare scope, charges, timing, security process, deliverables, terms, and fit.

One request. Every pro's best offer.

Start a request

Participation varies. A secure transaction, title, and closing-file review may be needed before a final service scope.

Planning guide: https://www.pickyourpro.ai/services/title-settlement-services

Consumer Financial Protection Bureau: Closing on your new home (official reference)

Consumer Financial Protection Bureau: What is owner's title insurance? (official reference)

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