

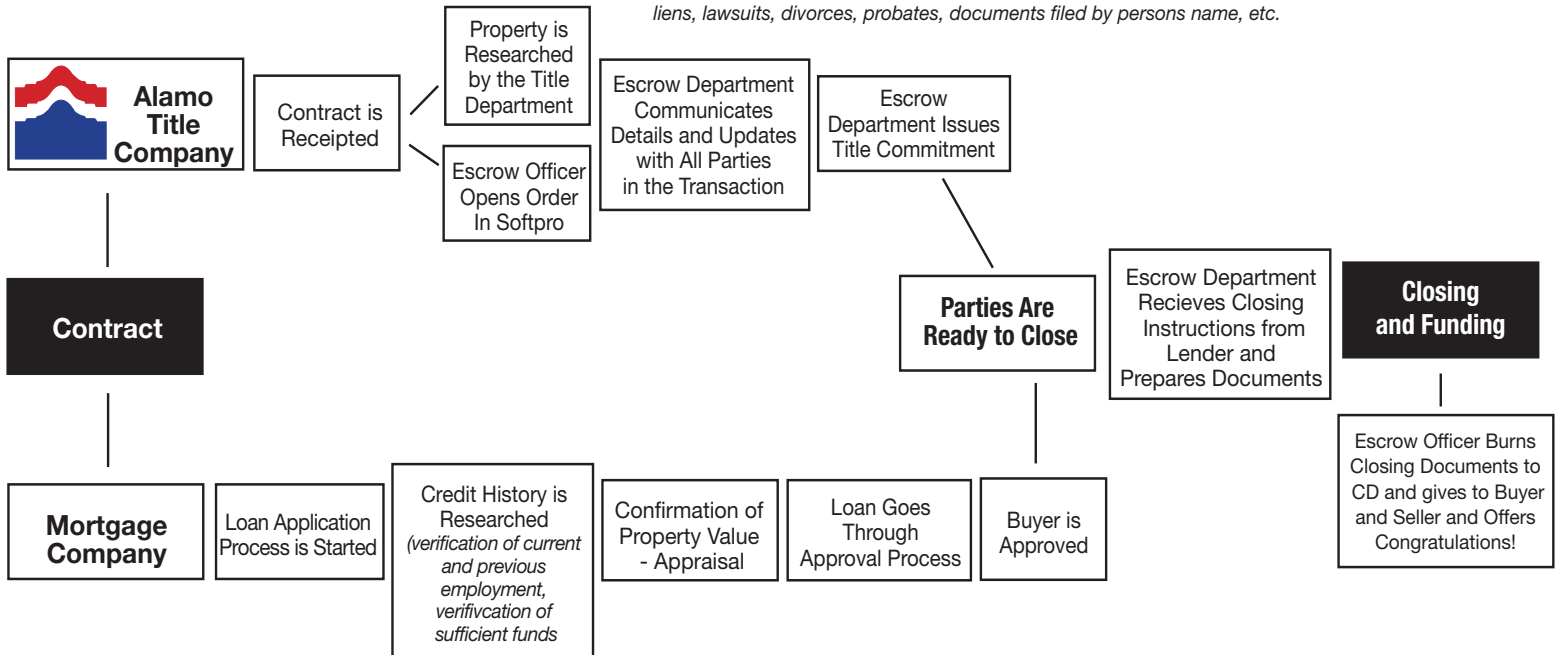
Contract to Closing Chart



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Title search includes a search of the history of the property (owners of record, liens, clouds on title, documents filed by legal description. Also included is a search of buyer and seller liens, lawsuits, divorces, probates, documents filed by persons name, etc.



Required at Closing:

Buyer:

- Your escrow officer will need the name and phone number of your lender and home owners' insurance agent.
- We encourage wire transfers from the purchaser and will be happy to wire out proceeds to the seller. The total amount due will be available prior to closing. Please contact your escrow officer/assistant for wiring instructions.
- Bring your drivers license or valid U.S. government picture ID to the closing for identification purposes.

Seller:

- Please provide your escrow officer or realtor with the name and phone number of your current mortgage lien holder and your loan number for payoff purposes.

Servicing Travis, Williamson, Bastrop and Hays Counties

Type of Record	Holding Period	Place to Save
Property Records: Mortgages, Alamo Title escrow instructions and Alamo Title insurance policy records, deeds, loan agreements, photos and id numbers of valuables.	As long as you own the property plus several more years as proof of paid off loans.	Originals in safe-deposit box; copies at home.
Family Records: Birth, marriage and death certificates, divorce and settlement papers, military discharge papers, adoption papers, school transcripts and diploma's.	Indefinitely.	Safe-deposit box
Health Records: Copies of forms showing immunizations, hospital stays, operations.	Indefinitely.	Home files.
Government Documents: Social security card, passport.	Indefinitely.	Card in a safe place, stun in safe-deposit box. Passport in safe-deposit box until needed..
Estate Materials: Wills, trusts burial instructions.	Indefinitely.	Originals with lawyer; copies and inventory in safe-deposit box.
Tax Records: Returns and supporting documents.	Seven years (required by the government).	Home files.
Home Improvement Records: Receipts, contracts and records of cost.	Until home is sold and tax liability is settled.	Home files. Copies in safe-deposit box.
Warranties, Guarantees: Contracts and proofs of purchase.	As long as you own the items.	Home files.
Insurance Records: Policies and household inventory, including photos and appraisals of valuables.	Until four years after the expiration of the policy.	Original policies at home; copies in inventory in safe-deposit box.
Investment Records: Securities, buy and sell orders, cancelled checks, statements and contracts for retirement plans.	At least three years beyond sale for tax purposes. Retirement materials indefinitely.	Certificates in safe-deposit, copies at home.
Bank Account Records: Cancelled checks, registers, statements and receipts.	Certificates of deposit (CD's) until maturity. Others as long as needed for related tax matters.	CD's and list of accounts in safe-deposit box. Ledger books and checks at home.
Credit Account Records: List of cards, records of payments.	Until obligation is discharged; longer to support tax matters.	Home files.
Master Lists of Assets and Liabilities: Record of financial accounts, property owned, insurance coverage taxes.	Update annually.	Home files. Copies in safe-deposit box.
Safe-Deposit Box Inventory	Indefinitely. Update as contents change.	Home files.