



Heartland

SETTLEMENT COMPANY

client kit

55 Commerce Drive, Wyomissing, PA 19610
Phone: 610-478-1717 ★ Fax: 610-478-1716



avoid problems at settlement

- ★ Review items required by lender as per your commitment letter
- ★ Review title commitment from Heartland Settlement Company
- ★ Be certain that funds for closing are in a liquid account and that certified funds are available
- ★ If estate is involved, contact us for other items required
- ★ Obtain pre-approval of powers of attorney from the settlement agent and the lender

things to bring to settlement

- ★ Good funds in the form of certified check or have funds wired to us (contact us for wiring instructions)
- ★ Two forms of I.D.
Examples: Driver's License, Social Security Card, Passport
- ★ Items required by your lender as per their commitment letter
- ★ Copy of Homeowner's insurance policy (buyer's policy only)

application:
HOMEOWNER



Ordered By _____

*Name _____ *E-mail _____

*Phone _____

*Fax _____

Date Ordered _____

Seller/Present Owner _____ Social Security # _____

_____ Social Security # _____

Borrower/Purchaser _____ Social Security # _____

_____ Social Security # _____

Mortgage Lender _____

***ADDRESS OF PROPERTY**

Street _____

City _____

Township/Borough _____

County _____

Zip Code _____

Is this a Purchase? Refinance? Construction Loan?

Purchase Price _____

Mortgage Amount _____

LENDER CONTACT

Name _____

Phone _____

REALTOR CONTACT

Name _____

Phone _____

ATTORNEY CONTACT

Name _____

Phone _____

Anticipated Closing Date _____

application

LENDER/REALTOR/ATTORNEY



By _____

Appl. Date _____

Appl. No. _____

Present Owner _____ Social Security # _____

_____ Social Security # _____

Purchaser _____ Social Security # _____

_____ Social Security # _____

Mortgagee _____

Premises _____

Tax Parcel No. _____

Is this a Purchase?

Refinance?

Construction Loan?

Purchase Price Lender Amount

INSTRUMENTS TO BE DRAWN

Deed _____ Mtge. _____ Other _____

Last Deed _____ Searcher _____

Special Instructions _____

Payoffs Required _____

Copies to _____

Settlement Date and Location _____ Applicant _____

what happens during the closing process



