

CLOSING PROCESS REVIEW CHECKLIST

August 3, 2023

Job # **31136**    New Home Address: **25 Enns Court ; 75/18/222-2161**  
Purchaser(s): **JAMIE TALLMANN & DANNY RUPERT**  
Phone: **7802923301** (H)    (C) Email: **jmtallmann@gmail.com**  
House Model: **COLUMBIA** Specification: **TRAILBLAZER** Subdivision: **SOUTHPOINTE - RSL**  
Sales Area Manager: **JUSTIN BATIUK**

Date of Closing Process Review meeting: 12/21/2023                      In-Person ☐                      Virtual ☐

To ensure closings go smoothly for our clients a meeting (in person or virtually) is to be held when the possession letter is provided.

**It is client responsibility throughout the closing process to ensure these tasks are completed.**

MORTGAGE REPRESENTATIVE

- 1. Contact Mortgage Specialist
  - Advise them of possession day ..... ☐
  - Ensure mortgage specialist has all addendums you wish to include in your mortgage ..... ☐
  - Provide the draft Statement of Adjustments to your Mortgage Specialist (Final version will be issued after mortgage documents are received by your lawyer) ..... ☐
  - Advise Mortgage Specialist that mortgage documents need to be delivered to your lawyer at least 2 weeks prior to possession. .... ☐
- 2. If any bank information has changed, updated information to be provided via an addendum ..... ☐

**It is the responsibility of the purchaser(s) to ensure financing is secured prior to possession. Purchaser(s) accept and acknowledge 18% interest charges will be applied for every day financing is not provided past possession.**

STATEMENT OF ADJUSTMENTS

- 1. Draft Statement of Adjustments to be reviewed. .... ☐
- 2. Security deposit to be provided at time of closing to Lawyers to be held in trust until Architectural inspections pass, including landscaping. (\$1 000 RPL, \$2 500 RSL). .... ☐
- 3. **Property tax** shown on the draft statement of adjustments may vary from the final statement of adjustments. Municipal property tax amendments after possession are the responsibility of the Purchaser(s). .... ☐

LAW OFFICE

- 4. Email [legalinquiry@stillmanllp.com](mailto:legalinquiry@stillmanllp.com) to schedule your appointment for at least 3 business days prior to possession. Book your appointment as quickly as possible as appointment times fill up quickly. .... ☐
- 5. Advise Stillman LLP if using your own lawyer and provide contact information. .... ☐
- 6. Out of town purchaser(s) may need more time. Please let your lawyer know if this applies to you. .... ☐

INSURANCE AGENCY

- 7. Arrange home insurance to begin on your possession day. .... ☐
- 8. Request the insurance binder letter be sent to your lawyer. .... ☐

PREOCCUPANCY & POSSESSION DAY APPOINTMENTS

- 9. The preoccupancy appointment will be roughly 1 week before possession and must be attended. .... ☐
- 10. Possession appointment will occur on possession day and must be attended. In the event, transfer of possession funds is not complete by the time this appointment concludes, arrangements will be made to hand over keys once funds are received. .... ☐

APPLIANCE DELIVERY & MOVERS

- 11. Notify Trail Appliances (or company used) of your possession day. .... ☐
- 12. Schedule delivery of appliances for the next business day after possession.

CLOSING PROCESS REVIEW CHECKLIST

August 3, 2023

- Installation of appliances will occur the next business day after delivery.
13. Provide any amount owing (as applicable)
- ..... ☐
- ..... ☐

ALBERTA NEW HOME WARRANTY INSURANCE COMMENCEMENT (WIC) FORM

14. Advise client to watch for the Alberta New Home Warranty Commencement Form via DocuSign. It is sent to clients a few days before possession. **Many lenders are now requiring the signed WIC before they release funds.**
- ..... ☐

Purchaser(s) herby acknowledges that they have read, understand, and agree to the above

DocuSigned by:

C9CFA8981C884F0...

DocuSigned by:

0AE8FC093534454...

DocuSigned by:

3EAEFFD277BE43A...

Area Sales Manager Signature

Jamie Tallmann

DANNY RUPERT

DS

CB

DS

PDR

DS

MR

DS

VB

