

CHICAGO-AREA ATTORNEY AGENTS Residential Transaction Reference Guide



We hope you find this Reference Guide to be a helpful resource. It has the information and contacts you and your team need to assist clients during an exciting and often stressful time. Our goal is to provide superior service and ensure a smooth closing experience. Feel free to contact me or any member of the Sales Team if you need immediate assistance. We are here to help!

Ami Oseid, Esq.
Senior Account Executive
Ami.Oseid@advocustitle.com | 312.218.0442

HELPFUL TIPS FOR ALL REQUESTS

Hours and Locations

- » 8:30 a.m. to 5:00 p.m. Monday – Friday, excluding these holidays: New Year’s Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Thanksgiving, Christmas
- » Visit [Office Hours and Locations](#) for the most up-to-date information.

Who Receives Your Emails

- » Emails sent to a specific team’s general email address (e.g., Escrow@advocustitle.com) go to the entire team and the manager.
- » Consider cc’ing the team mailbox on communication to a specific person in case that person is out of the office.

Include Your Account Executive (AE or Title Rep) on Emails

- » Please cc your AE on any emails you send to Advocus so they are aware of your needs and can offer assistance.

Subject Line of Emails

- » For a more prompt response, include the following in the subject line:
 - Property address.
 - General reason for the request.
Examples: *Need Commitment Update, Need Revised Figures, Need to Reschedule*
 - Advocus file number.

Urgent Requests

- » **Escalations** should be reserved only for urgent requests (i.e., one request has already been sent to the department’s general mailbox but now needs immediate attention).
 - Start email subject line with “URGENT.”
 - CC the escalation contact for the applicable department shown in this Reference Guide.
 - Call and/or text your AE, in addition to sending the email, to make them aware of the urgency.

Questions?

- » **Ask your AE!** While this Reference Guide is intended to be a helpful tool on who to contact within the Advocus Team, please do not hesitate to contact your AE if you are still unsure of where to send a question or request.
- » **Always Feel Free to Call.**

PRE-CLOSING REQUESTS, COMMON TITLE ISSUES

Escalations

January Lind, Director – National Title Services
January.Lind@advocustitle.com
561.245.6663

Matt Rowan, SVP – Shared Services
Matt.Rowan@advocustitle.com
724.390.2134

New Title Orders

- » Place new orders directly.
- » Check status of an order placed on the ATG GO platform.
- » Send a new contract on an existing order.

Contact: Orders@advocustitle.com

Manager: Mindy Ward, Mindy.Ward@advocustitle.com or 217.403.0103

ATG GO

- » Ask questions when placing orders, viewing documents, or performing title exams on ATG GO.

Contact: Melissa Johnson, Melissa.Johnson@advocustitle.com or 312.752.1386

Earnest Money Held by Advocus

- » Request an Earnest Money Joint Order Escrow Instructions and Payout Authorization so earnest money can be deposited with Advocus.
- » Ask questions about the process for depositing and releasing earnest money held by Advocus prior to closing.

Contact: Escrow@advocustitle.com or 312.372.8361

Manager: Joan Lowery, Joan.Lowery@advocustitle.com or 312.509.4225

Search Package Production and Recorded Documents

- » Request status of search package for new order.
- » Request additional recorded documents not included in search package.
- » Ask questions about:
 - PINs.
 - Recorded information.

Contact: SearchDepartment@advocustitle.com

Manager: Dawn Markunas, Dawn.Markunas@advocustitle.com or 312.752.1179

Title Commitment Production and Revisions

- » Request title commitment updates and revisions (including Lender requests).
- » Check status of title commitment.

Contact: Title@advocustitle.com or 217.403.0300

Manager: Mindy Ward, Mindy.Ward@advocustitle.com or 217.403.0103

Title Exam and Clearance

- » Substantive questions related to title clearance, chain of title issues, legal documents, or any underwriting issues (trusts, divorce matters, direction of proceeds, etc.).
- » Ask questions about:
 - Title clearance, types of documents that satisfy clearance.
 - Municipal requirements, how to satisfy.
 - Submitting surveys, PIAs, and clearance documents prior to closing.

Contact: Legal@advocustitle.com or 312.752.1990

FinCEN Reporting

- » Ask if an order requires FinCEN reporting.
- » Submit completed FinCEN prior to closing.

Contact: Fincen@advocustitle.com or Megan Scharlau, Megan.Scharlau@advocustitle.com or 312.752.1123

Obtaining a Hold Harmless

- » Request a Hold Harmless from Advocus for an issue related to a prior Advocus closing.
- » Request assistance from Advocus in obtaining a Hold Harmless from another title company for an upcoming Advocus closing.

Contact: HoldHarm@advocustitle.com

Orders for Title Company to Obtain Clearance Documents and Municipal Certifications

- » Order City of Chicago Water and Zoning Certifications.
- » Ask questions about:
 - Availability of services related to suburban municipal requirements and stamp.
 - Survey orders.

Contact: Clearance@advocustitle.com

Manager: Julissa Acevedo, Julissa.Acevedo@advocustitle.com or 312.752.1115

Closing Protection Letters

- » Request CPLs.

Contact: CPL@advocustitle.com or Suzy Shaw, Suzy.Shaw@advocustitle.com or 217.403.0130

CLOSING-RELATED QUESTIONS

Escalations

Judy Zapka, SVP – Illinois Closing Operations
Judy.Zapka@advocustitle.com
312.752.1015

Scheduling and Notary Signings

- » Schedule closings and obtain closing confirmations.
 - *Buyer's Attorneys:* Request a virtual closing using GO Live, the virtual closing platform available only at Advocus.
 - *Seller's Attorneys:* Request a pre-closing notary appointment for Seller to pre-sign closing documents (in person or via RON).
- » Contact your closer: obtain your closer's contact information.
 - NOTE: Closers are generally assigned one to two business days before closing.

Contact: Scheduling@advocustitle.com or 312.372.1585

Manager: Julissa Acevedo, Julissa.Acevedo@advocustitle.com or 312.752.1115

Seller Figures and Seller Closing Documents

- » Seller's Attorneys:
 - Submit Seller closing figures or request updates to Seller closing figures.
 - Request preliminary statements.
 - Request executed CDs and settlement statements after closing.

Contact: Figures@advocustitle.com

Manager: Julissa Acevedo, Julissa.Acevedo@advocustitle.com or 312.752.1115

Lender Figures and Loan Packages

- » Lenders:
 - Request initial and preliminary CDs.
 - Submit Lender closing packages.
 - Request any closing information on their files.

Contact: Packages@advocustitle.com

Manager: Julissa Acevedo, Julissa.Acevedo@advocustitle.com or 312.752.1115

Wire Instructions – How to Send Funds to Advocus Prior to Closing

- » Always direct Buyers and Lenders to the Advocus website to obtain wire instructions.
- » Provide the full Advocus file number to any parties you direct to the Advocus website for wire instructions.

Website Wire Transfer Instructions

- » Go to advocus.com
- » Click **Transactional Tools > Wire Transfer Instructions**.

Providing Seller Proceeds Wire Information and Mortgage Payoffs through Closinglock

- » Ask questions about:
 - How Sellers should provide wire information for the purpose of sending Seller proceeds via wire after funding.
 - How Sellers can use the Closinglock platform to upload Seller bank account and wire information prior to closing.
- » Learn more about [Closinglock](#):
 - [Security and Simplicity for Your Client's Closings through Closinglock](#)

Contact: Closings@advocustitle.com

Status of Seller Proceeds after Closing

- » Ask questions about:
 - Status of Seller proceeds after funding/closing.
 - Status of proceeds wires.

Contact: DisbursementAccounting@advocustitle.com or 312.372.8394

Manager: Errol Jones, Errol.Jones@advocustitle.com or 312.383.6319

POST CLOSING REQUESTS

Escalations:

Matt Rowan, SVP – Shared Services
Matt.Rowan@advocustitle.com
724.390.2134

Closing Payments and Payoffs

- » Ask questions about:
 - Wires sent to payees from closing.
 - Mortgage payoffs processed through closing.
 - Status of closing checks.
- » Provide instructions on where closing checks should be sent.
- » Questions regarding status of closing checks.

Contact: DisbursementAccounting@advocustitle.com or 312.272.8394

Manager: Errol Jones, Errol.Jones@advocustitle.com or 312.383.6319

Recordings

- » Ask questions about:
 - Status of recording closing documents post-closing.
 - Attorney-obtained transfer stamps.

Contact: Recordings@advocustitle.com or 312.752.1161

Manager: Vicki Voigt, Vicki.Voigt@advocustitle.com or 312.752.1161

1099 Requests

- » Request copy of a Seller 1099.

Contact: Chloe Meyer, Chloe.Meyer@advocustitle.com or 217.403.0136

Policy Requests

- » Request copy of policy issued upon closing.

Contact: PolicyRequests@advocustitle.com

Manager: Vicki Voigt, Vicki.Voigt@advocustitle.com or 312.752.1161

File a Claim

- » File a claim on an Advocus Policy.

Contact: Claims@advocustitle.com

SALES TEAM

Please do not hesitate to contact any member of the sales team if you have an urgent request and need assistance.

We are ALL here to help you and make sure your needs are addressed.

Ami Oseid, Senior Account Executive and Attorney
Ami.Oseid@advocustitle.com Cell: 312.218.0442

Stan Czaja, EVP – General Manager
Stan.Czaja@advocustitle.com Cell: 773.516.6498

Kelli Fogarty, EVP – Business Development and Attorney
Kelli.Fogarty@advocustitle.com Cell: 312.933.6207

Hank Shulruff, EVP – Chief Growth Officer and Attorney
Hank.Shulruff@advocustitle.com Office: 312.752.1405

GENERAL REQUESTS, NOT FILE-SPECIFIC

Title Production and Software Support

- » ATG GO, SoftPro, Qualia, AdvocusHQ

Contact: Melissa Johnson, Melissa.Johnson@advocustitle.com or 312.752.1386

CUSTOMER SUCCESS TEAM



Hank Shulruff
EVP – Chief Growth Officer
Hank.Shulruff@advocustitle.com
312.752.1405
Industry Experience: Since 1987



Kelli Fogarty
EVP – Business Development
Kelli.Fogarty@advocustitle.com
312.933.6207
Industry Experience: Since 2001



Stan Czaja
EVP – General Manager
Stan.Czaja@advocustitle.com
773.516.6498
Industry Experience: Since 2003



Lynne Crotty
EVP – Chief Operating Officer
Lynne.Crotty@advocustitle.com
312.752.1124
Industry Experience: Since 2008



Matt Rowan
SVP – Shared Services
Matt.Rowan@advocustitle.com
724.390.2134
Industry Experience: Since 2001



Judy Zapka
SVP – Illinois Closing Operations
Judy.Zapka@advocustitle.com
312.752.1015
Industry Experience: Since 2010



Karen Courtney
SVP – Lead Counsel
Karen.Courtney@advocustitle.com
312.752.1409
Industry Experience: Since 2002



January Lind
Director – National Title Services
January.Lind@advocustitle.com
561.245.6663
Industry Experience: Since 1996



Julissa Acevedo
Closing Coordinator Manager
Julissa.Acevedo@advocustitle.com
312.752.1115
Industry Experience: Since 2017



Errol Jones
Disbursement Accounting Manager
Errol.Jones@advocustitle.com
312.383.6319
Industry Experience: Since 2020



Joan Lowery
Escrow Manager
Joan.Lowery@advocustitle.com
312.509.4225
Industry Experience: Since 1993



Dawn Markunas
Search Department Manager
Dawn.Markunas@advocustitle.com
312.752.1179
Industry Experience: Since 1999



Vicki Voigt
Recording Manager
Vicki.Voigt@advocustitle.com
312.752.1161
Industry Experience: Since 1988



Melissa Johnson
Director – Customer Success
Melissa.Johnson@advocustitle.com
312.752.1386
Industry Experience: Since 2013



Chloe Meyer
1099 Administrator
Chloe.Meyer@advocustitle.com
217.403.0136
Industry Experience: Since 2021



Megan Scharlau
Executive Assistant
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312.752.1123
Industry Experience: Since 2012



Suzy Shaw
Senior Member Representative
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217.403.0130
Industry Experience: Since 1987



Mindy Ward
Underwriter and Lead Title Examiner
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217.403.0103
Industry Experience: Since 1995

UNDERWRITING ATTORNEYS



Lowell Krahn
Senior Underwriting Attorney
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312.752.1165
Industry Experience: Since 2002



Nathan Smith
Underwriting Attorney
Nathan.Smith@advocustitle.com
847.403.3366
Industry Experience: Since 2015



Alisa Swerdlove
Underwriting Attorney
Alisa.Swerdlove@advocustitle.com
312.752.1463
Industry Experience: Since 2001



Andrew Thompson
Underwriting Attorney
Andrew.Thompson@advocustitle.com
312.752.1088
Industry Experience: Since 2004