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| --- |
| **Complete the following information and return to Advocus™ by email to title@advocustitle.com.** |
| Agent Name: |  |  | Agent No.: |   |
| Firm Name: |  |
| Advocus Order No.: |  |  | Agent File No.: |  |
|  |  | (if different than Advocus Order No.) |
| **Order Information** |
| Purchase Price: |  |  |  |  |
| First Lender: |  |  | First Loan Amount: |   |
| Second Lender: |  |  | Second Loan Amount: |   |
| **Closing Information** |
| Anticipated Closing Date: |  |  |  |
| Closing to be Conducted By: |  |
|  | (Advocus, Advocus Agent, Lender, Third Party) |
| **Title Charges** |
|  |  |  | Premium | Portion Retained by Agent | Remittance to Advocus |
| Owner’s Policy: |  |  |  |  |  |
| Loan Policy: |  |  |  |  |  |
| Search Fee: |  |  |  |  |  |
| SAL: |  |  |  |  |  |
|  |
| Endorsements: | Fee | Portion Retained by Agent | Remittance to Advocus |
|  | [ ]  | Restrictions, Encroachments, Minerals (Loan Policy Only) |  |  |  |  |  |
|  | [ ]  | Environmental Protection Lien (Loan Policy Only) |  |  |  |  |  |
|  | [ ]  | Location (Loan Policy Only) |  |  |  |  |  |
|  | [ ]  | Other: |  |  |  |  |  |  |  |
|  | [ ]  | Other: |  |  |  |  |  |  |  |
|  |  |  | **Total Title Charges:** |  |
| Additional Fees to be Shown on Invoice: | Fee |  |  |
|  | [ ]  |  |  |  |  |  |  |  |
|  | [ ]  |  |  |  |  |  |  |  |
|  |  |  |  |  |  | **Grand Total:**  |  |  |

|  |
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| **Property Information** |
| Parcel Type: |  |
|  | (Single Family Residential, 1-4 Family Residential, Commercial, etc.) |
| Address: |   |  | County: |  |
| City, State, Zip: |   |  | P.I.N.: |   |
| **Buyer/Seller Information** |
| Seller(s): |  |  |  |
|  |  |  |  |
| Buyer(s): |  |  |  |
|  |  |  |  |
| **Schedule A** |
| 1. | Effective Date: |   |  |
| 2. | Policies to be issued: |  |  |
|  | [ ]  | Owner’s Policy |
|  |  | Proposed Insured: | [ ]  Buyer | [ ]  Other: |  |
|  |  | Amount of Insurance: | [ ]  Purchase Price | [ ]  Other: |  |  |
|  | [ ]  | First Loan Policy |  |  |
|  |  | Proposed Insured: | [ ]  Lender | [ ]  Other: |  |
|  |  | Amount of Insurance: | [ ]  Loan Amount | [ ]  Other: |  |  |
|  | [ ]  | Second Loan Policy |  |  |
|  |  | Proposed Insured: | [ ]  Lender | [ ]  Other: |  |
|  |  | Amount of Insurance: | [ ]  Loan Amount | [ ]  Other: |  |  |
| 3. | Title is vested in: |  |  |
|  | [ ]  | Grantee in Document No.: |  |  |  |
|  | [ ]  | Other: |  |
| 4. | Legal Description: |  |  |
|  | [ ]  Use legal description in Document No.: |  |
|  | [ ]  See attached copy of legal description. |  |

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| **Schedule B: B-I Requirements** |
| Identify all documents, affidavits, and other materials that must be supplied to the closer at or prior to the closing. These documents are needed in order for the closer to assure that the B-I requirements have been met prior to the disbursement of proceeds and issuance of final policy. |
| 5. | Conveyance Document |  |  |
|  | [ ]  | Warranty Deed | [ ]  Condominium Deed | [ ]  Land Contract |
|  | [ ]  | Quit Claim Deed | [ ]  Personal Representative’s Deed | [ ]  Trustee’s Deed |
|  | [ ]  | Other: |  |  |
|  |  | [ ]  | Include the following: |  |
|  |  |  | The conveyance called for herein must be joined in by the spouse of each grantor, vendor, assignor, or mortgagor, whichever the case may be; or the instrument must designate that said party is single, or that the premises conveyed are not the homestead of said party to comply with Section 706.02(1)(F) of the Wisconsin Statutes. |
| 6. | Creation of Mortgage Lien |  |  |
|  | [ ]  | Purchase Money Mortgage | Amount: |  |  |  |
|  | [ ]  | Other | Amount: |  |  |  |
|  |  | [ ]  | Include the following: |
|  |  |  | The conveyance called for herein must be joined in by the spouse of each grantor, vendor, assignor, or mortgagor, whichever the case may be, or the instrument must designate that said party is single, or that the premises conveyed are not the homestead of said party to comply with Section 706.02(1)(F) of the Wisconsin Statutes. |
|  |  | [ ]  | Use in conjunction with the above: |
|  |  |  | If all of the proceeds of the proposed mortgage are to be disbursed to the seller of the subject premises as part of the purchase price and said mortgage recites on the face thereof that it is a PURCHASE MONEY MORTGAGE, the above requirement may be disregarded. |
|  | [ ]  | No mortgage is being created. |
| 7. | Satisfaction of the Following: |  |  |
|  | [ ]  | No Existing Mortgage/Land Contract |
|  | [ ]  | Existing Mortgage/Land Contract *(check one)* |
|  |  | [ ]  | Document No.: |  | OR | [ ]  Search Report Paragraph No.: |  |
|  |  | [ ]  | Other: |  |  |  |  |
|  | [ ]  | Second Mortgage *(check one)* |
|  |  | [ ]  | Document No.: |  | OR | [ ]  Search Report Paragraph No.: |  |
| 8. | Judgments and/or Liens |  |  |
|  | [ ]  | No Existing Docketed Judgments or Other Liens |
|  | [ ]  | Outstanding Judgments and Other Liens; See Search Report Paragraph No(s).: |  |
|  | [ ]  | Other: |  |
| 9. | Taxes |  |  |
|  | [ ]  | Taxes are paid in full; none outstanding or delinquent. |
|  | [ ]  | Proof of payment of General and Special Taxes and Assessments for the year |  | , in the amount of |  | . |
|  | [ ]  | Proof of payment of delinquent real estate taxes for the year |  | , in the amount of  |  | , plus penalties |
|  |  | and interest.  |
|  | [ ]  | Other: |  |
| 10. | Condominium Property |  |  |
|  | [ ]  | This is not a condominium transaction. |
|  | [ ]  | This is a condominium transaction. Include the following: |
|  |  | [ ]  | Proof of payment of the following: Unpaid assessments or charges for common expenses, fines, penalties, levies, or costs asserted under the declaration of condominium or any amendments or bylaws adopted pursuant thereto or the Condominium Ownership Act. |
|  |  | [ ]  | Release or Waiver of: Option or right of first refusal, if any, to purchase, lease, or otherwise alienate the above described unit in the Association of Homeowners, the Declarant, adjoining unit owners, or any other person. If there is no option or right of first refusal, the Association shall verify to this Company in writing that none exists. |
| 11. | Authority to Convey |  |  |
|  | [ ]  | No proof of authority to convey is required. |
|  | [ ]  | Proof of authority to convey is required upon the: | [ ]  Seller | [ ]  Buyer |
|  |  | [ ]  | Corporation: | [ ]  Active  | [ ]  Dissolved | [ ]  Foreign |
|  |  |  | Resolution to authorize the conveyance: |  |  |  |
|  |  |  |  | [ ]  is required. | [ ]  is attached. | [ ]  Other: |  |
|  |  | [ ]  | Limited Liability Company |
|  |  |  | Proof of filing with DFI: | [ ]  is required. | [ ]  is attached. | [ ]  Other: |  |
|  |  |  | Articles of Incorporation: | [ ]  shall be furnished. | [ ]  have been furnished. |
|  |  |  | Operating Agreement:  | [ ]  shall be furnished. | [ ]  has been furnished. | [ ]  Other: |  |
|  |  | [ ]  | Personal Representative |
|  |  |  | Domiciliary Letters: | [ ]  shall be filed upon commencement of estate proceedings. |
|  |  |  |  | [ ]  have been filed. | Name of Decedent: |  |
|  |  |  |  |  | County and Case No.: |  |
|  |  |  |  | [ ]  Other: |  |
|  |  | [ ]  | Power of Attorney: | [ ]  shall be furnished. | [ ]  has been furnished. | [ ]  Other: |  |
|  |  | [ ]  | Bankruptcy |
|  |  |  | Proof of Trustee’s appointment and authorization: |  |  |  |
|  |  |  |  | [ ]  shall be furnished. | [ ]  has been furnished. | [ ]  Other: |  |
|  |  |  | Proof of Relief from Automatic Stay: |  |  |  |
|  |  |  |  | [ ]  shall be furnished. | [ ]  has been furnished. | [ ]  Other: |  |
|  |  | [ ]  | Trusts |
|  |  |  | Name of Trust: |  |
|  |  |  | Trust instrument or court authorization to convey real estate: |
|  |  |  |  | [ ]  shall be furnished. | [ ]  has been furnished. | [ ]  Other: |  |
|  |  | [ ]  | Other Authority: |  |
|  |  |  | [ ]  The following shall be furnished: |  |
|  |  |  | [ ]  The following has been furnished: |  |

|  |  |
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| **12.** | **The following paragraph numbers, identified in the Search Report, shall be included as B-I Requirements. In addition, please indicate any additional Requirements that you want added to this section:** |
|  |  |
| **Schedule B: B-II Exceptions** |
| Identify all matters that affect the legal ownership to the property. Exceptions need not be addressed prior to closing or issuance of final policy. Some exceptions may be removed from title or insured over if proper documentation is provided |
| A. | Taxes for the year |  |  and thereafter: *(oldest year in which taxes are due)* |
|  | [ ]  | Taxes for the year |  | , in the amount of |  | , are: *(oldest year in which taxes are due)* |
|  |  |  |  | [ ]  paid in full | [ ]  unpaid and due | [ ]  delinquent and due, plus penalty and interest. |
|  | [ ]  | Taxes for the year |  | , in the amount of |  | , are: *(previous year)* |
|  |  |  |  | [ ]  paid in full | [ ]  unpaid and due | [ ]  delinquent and due, plus penalty and interest. |
|  | [ ]  | Taxes for the year |  | , in the amount of |  | , are: *(current year)* |
|  |  |  |  | [ ]  paid in full | [ ]  unpaid and due | [ ]  delinquent and due, plus penalty and interest. |
|  |  |  |  | [ ]  not yet due and payable. |
| B. | Condominium Property |  |  |
|  | [ ]  | This is not a condominium transaction. |
|  | [ ]  | This is a condominium transaction. Include the following: |
|  |  | [ ]  | Assessments or charges for common expenses, fines, penalties, levies, or costs asserted under the Declaration of Condominium or any amendments or bylaws adopted pursuant thereto or under the Condominium Ownership Act. |
|  |  | [ ]  | Covenants, conditions, restrictions, reservations, limitations, uses, agreements, charges, assessments, easements, and other provisions, all contained in the declaration of condominium as recorded in the Office of the Register of Deeds for  |
|  |  |  |  | County, Wisconsin, on |  | , as Document No. |  | , |
|  |  |  | and bylaws of the Condominium Homeowners Association, and as amended, modified, or corrected. |
|  |  |  | *(Please provide data for blanks above, or reference a Paragraph No. from Search Report.)* |

|  |  |
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| C. | Include the following as exceptions in the title commitment: |
|  | *(For a complete description of each exception and its full language, consult the Advocus Underwriting Manual or the Advocus Wisconsin REsource Exception Library.)* |
|  | [ ]  | Special charges, fees, or assessments, if any, for work or services provided by the City of Milwaukee, which do not appear on a Special Assessment/Charges Letter obtained from the City of Milwaukee Department of Neighborhood Services. |
|  | [ ]  | Assessments, if any, levied by the |  | District. |
|  | [ ]  | Rights of the public and private rights of others entitled thereto in and to the use of the portion of the premises that may be within the boundaries of any highway, public road, street, alley, or other public way. |
|  | [ ]  | Rights of the public in that portion of the Land described in Schedule A as may lie below the ordinary high-water mark, |
|  |  | and in the waters of and airspace over |  | . |
|  | [ ]  | **The following paragraph numbers, identified in the Search Report, shall be included as B-II Exceptions. In addition, please indicate any additional Exceptions that you want added to this section:** |
|  |  |  |
| D. | Include the following notes: |  |  |
|  | [ ]  | Note: The Loan Policy, when issued, will contain the Restrictions, Encroachments, Minerals – Loan Endorsement (ALTA 9-06; formerly known as Comprehensive Endorsement), and Environmental Protection Lien Endorsement (EPL) (ALTA 8.1), and a Location Endorsement 1 (ALTA 22-06). |
|  | [ ]  | Note: The Effective Date of the commitment has not been extended to a date subsequent to all of the known recordings as shown herein; therefore, this commitment may not disclose all intervening matters and should not be construed as to extending beyond said effective date. |
| Comments and/or additional information regarding this transaction: |
|  |  |
| The undersigned certifies that he or she has reviewed the prior policy (if any), search report, Chain of Title, judgment and lien search, tax information, and title documents on this file and has relied on those items and other personal information to make these underwriting directions |
|  |  |  |
| Signature of Agent |  | Date |