

HENEY & ASSOCIATES, LLC

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In order to expedite the process of your closing, please supply us with the following information.
Complete this document and fax back to Heney & Associates, LLC at (978) 921-7877.

Note: Failure to provide us this information promptly could delay your closing date!

Note: You will be required to produce photocopies for two forms of ID for each person.

Name: _____ Soc. Sec. No.: _____

Name: _____ Soc. Sec. No.: _____

Property Address: _____

Home #: _____ Cell #: _____

E-mail Address: _____ (by providing this, you are authorizing Heney & Associates to contact you via e-mail.)

Do you have an attorney representing you? If yes please provide us with name and phone number for attorney:

_____ Telephone Number: _____

***Please note that Massachusetts Rules of Professional Conduct Rule 4.2 prevents us from communicating with represented parties. If you are represented all communication will be disseminated through your attorney.*

Please provide us with your homeowner's insurance agent:

Agent _____ Policy # _____ Telephone Number: _____

Our preference for taking title to the real estate is:

Individually _____ Tenants by the Entirety _____ Joint Tenants _____ Tenants in Common _____

Marital Status: _____ married _____ single Spouse's Name: _____

We will be required to obtain on your behalf a lender's policy of title insurance. We strongly suggest that you obtain an Owner's Policy of title insurance to protect yourself from title defects that may not have been discovered or corrected prior to this closing. Please contact our office to discuss the premium for an Owner's Policy.

Would you like to receive a *free* Estate Planning consultation at the end of your closing? Yes ___ No ___

Signature

date

Signature

date