

# **HENEY & ASSOCIATES, LLC**

**86 DODGE STREET  
BEVERLY, MA 01915**

**TELEPHONE: (978) 921-1050  
TOLL FREE: (866) 550-1050**

**FACSIMILE: (978) 921-7877  
WWW.HENEYLAW.COM**

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