



FIRST EXCEL TITLE, LLC

Real Estate Settlement Services

Fairfax Office

3201 Jermantown Road, Suite 850
Fairfax, VA 22030
MAIN: (703) 259-0840
FAX: (703) 259-0841

District of Columbia Office

5335 Wisconsin Avenue, Suite 440
Washington, D.C. 20015
MAIN: (202) 686-2876
EFAX: (703) 653-8102

www.firstexcel.net

SETTLEMENT INFORMATION QUESTIONNAIRE

Purchaser Name(s): _____

Seller Name(s): _____

Property Address: _____

Purchaser's Current Marital Status: _____

*(Please complete Tenancy Selection Form)

Social Security Number of EACH Purchaser:

Name: _____ SSN: _____

Name: _____ SSN: _____

Home Phone: _____

Work Phone: _____

Cell Phone: _____

E-MAIL Address: _____

Will there be a Power of Attorney? Yes _____ No _____

(All Powers of Attorney MUST be approved by this office and your lender prior to settlement.
We will need the notarized original for settlement.)

IF Obtaining a Mortgage, Lender Information:

Lender Name: _____ Phone: _____

Loan Officer: _____

Homeowner's Insurance Carrier (If known at this time)

Name: _____ Phone: _____

Agent: _____ Annual Premium: _____

Any Special Credits we should be aware of (such as preoccupancy, closing cost credits, etc.)

Realtor Contact Information

Name: _____ **Phone:** _____

Email: _____



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Tenancy Selection Form

Listed below are various forms of tenancy commonly selected. The checked box below indicates the tenancy you want to appear on your deed. Please be sure that the correct box has been checked. IF YOU NEED LEGAL ADVICE IN MAKING YOUR CHOICE, PLEASE CONSULT AN ATTORNEY.

PLEASE CHECK ONLY ONE BOX:

_____ **TENANTS BY THE ENTIRETY WITH THE COMMON LAW RIGHT TO SURVIVORSHIP.**

ONLY husband and wife may hold title with this tenancy. Should one spouse predecease the other, title to the property automatically vests in the survivor. A lien or judgment filed against only one spouse will not be a lien against property held with the tenancy. (With the exception of IRS Tax Liens)

_____ **JOINT TENANTS WITH THE COMMON LAW RIGHT TO SURVIVORSHIP.**

Two or more people may hold title this way. As with Tenants by the Entirety, should one owner predecease the other owner(s), title automatically vests in the surviving owner(s). A lien or judgment against any one owner could be a lien against the debtor's interest in the property.

_____ **TENANTS IN COMMON**

Any two or more people (including husband and wife) may hold title this way. Each person has an undivided fractional interest in the property. In the event of an owner's death, his or her interest will not pass automatically to the surviving owners but rather will vest in the heirs or devisees under his or her will, or pass by the laws of Intestacy if no will exists.

_____ **INDIVIDUAL OWNERSHIP**

The property is conveyed to one owner who has the exclusive use and benefit of the property and the right to dispose of it.

_____ **OTHER (PLEASE CONSULT WITH YOUR LENDER AND FIRST EXCEL TITLE FOR APPROVAL)**

The undersigned hereby authorizes First Excel Title, LLC to have their legal counsel prepare the deed in accordance with the selection made herein.

PrintName: _____

Print Name: _____

**PLEASE RETURN COMPLETED FORM TO
FIRST EXCEL TITLE, LLC:**

AMANDA W. MAYO:
p: 703-259-0844
amayo@firstexcel.net
efax: 703-890-2517

BARI MARTENY:
p: 703-766-1044
bmarteny@firstexcel.net
efax: 703-653-7401