File Number ___________________

KELSEY LAW, P.C.
REAL ESTATE CLOSING INFORMATION SHEET

Kelsey Law represents (please check):

Est. Closing Date: _________________

☐ REFI or ☐ BUYER or ☐ SELLER

Purchase Price: ___________________

For Office Use Only

Packet Sent: ________ Rec'd Engagmt. ______ Rec'd Privacy ______ Rec'd Title _______ (BUYER ONLY)

Property Address: ____

BUYER'S INFORMATION:

Buyer's Name(s): _________________________________Spouse's Name(s):____

Phone Numbers: (H):________________________ (W):__________________________ (C):___________________________

Email: ____

Selling Real Estate Agent: ____________________________ Company: ____

Contact Phone Number(s): ____

Email: ____

Buyer's Attorney/Settlement Agent: ____

Phone: ______________________ Fax: _______________________ Email: ________________________________

Lender: ___________________________ Contact Info: ______________ ____

____

____

Other: ____

____

____

____

SELLER'S INFORMATION: **SS #** ____

Seller's Name(s): ___________________________________Spouse's Name(s):____________________________________

Phone Numbers: (H):_______________________ (W):___________________________ (C):__________________________

Email: ____

Listing Real Estate Agent: ____________________________ Company: _______________________________________

Contact Phone Number(s): ____

Email: ____

Seller's Attorney/Settlement Agent: ____

Phone: ____________________ Fax: _____________________ Email: ____________________________________

Current Mortgage Co. for Payoff: _______________________________Loan/Acct. #: ________________________________

Contact Name: ___________________________________Phone: ____

Client(s) Social Security #(s): ________________________________ ____________________________________

Forwarding Address: ____

Do you want your proceeds wired?

For Office Use Only

Copy of Deed requested: __________ Rec'd.: ___________ Payoff ordered: __________ Rec'd.: ____________

Transaction Coordinator:

Name: ____________________________

Email: ____________________________

Caroline E. Kelsey
Attorney At Law

ENGAGEMENT LETTER FOR SETTLEMENT SERVICES

THIS CONTRACT made _____________ (date), by and between Kelsey Law P.C. and ______________________________ hereinafter referred to as the Client, and Kelsey Law, PC, hereinafter referred to as the Attorney. Client acknowledges and/or agrees to the following:

1) Client has the right to choose any settlement agent, not necessarily an Attorney, for their closing;

2) SELLER Closing fee starts at $495.00 plus a $195 document preparation fee and $45 courier fee; $150 E-Notary services (per person, if applicable). If Seller's closing involves a VA Assumption, seller's closing fee starts at $595.

3) BUYER Settlement fee starts at $695.00 plus $195 document preparation fee and $45 courier fee (and $495.00 for second loans). If Buyer's closing involves a Foreclosure or VA Assumption Seller, then settlement fee starts at $795.

4) REFINANCE Settlement fee starts at $595.00 plus $195 document preparation fee and $45 courier fee.

5) ESTATE, HEIR, DEVISEE Settlement fee starts at $495 (per person/estate) plus $195 document preparation fee and $45 courier fee; $150 E-Notary (per person, if applicable).

6) The above settlement fees include the basic scope of settlement services. This fee does not include the following expenses associated with the closing, i.e., legal work, title curative fees, courier, title insurance fees, title examination, court fees, mortgage payoff fees, recording fees, release fees, release management fees, taxes, postage, etc. Seller(s) authorizes any Settlement Agent to charge release fees as Attorney deems appropriate.

7) In the event that a Seller wants short sale services provided by Attorney, the fee must be approved by the short sale lender. In most cases, seller will not incur out of pocket costs at closing for Attorney's fee.

8) The settlement fee does not include work deemed by the Attorney as above and beyond the basic scope of real estate services. In the event that work goes beyond the basic scope of real estate services, additional fees will be charged at a rate of $350.00 per hour.

9) Client authorizes Attorney and staff to communicate with all necessary parties to facilitate their real estate closing.

10) Caroline Kelsey, the Principal of Kelsey Law, PC is also an attorney and broker for Wainwright Real Estate located in Virginia Beach, Virginia.

11) In the event that a conflict of interest arises between Client and Wainwright Real Estate, Kelsey Law, PC shall withdraw from Client representation in this matter and decline any

employment by Client subsequent to any matter which is substantially related to this real estate transaction.

12) Kelsey Law, PC may represent as Customer or as Client the "other" principal parties of the real estate contract for settlement purposes.

13) Pursuant to the real estate purchase agreement, the principal parties are responsible for ordering and paying for any property and/or home inspection, survey, appraisal, property owner's association documents and/or condominium association documents.

14) Sellers and mortgagors authorize attorney to order mortgage payoff, any judgment payoff and any other necessary documents to facilitate the closing.

15) In the event that the attorney orders on behalf of the Buyer, a survey and/or title search/binder, the Buyer will be directly responsible to Kelsey Law, PC for payment of services.

16) It is acknowledged and understood that if either the Buyer or Seller is not a client but only a customer, the customer does not have a lawyer-client relationship with Attorney and the Attorney has not given Customer any legal advice.

17) Please note that the attorney client representation terminates upon 3 months after any buyer or seller closing unless otherwise agreed upon.

We look forward to working with you.

______________________________ Date: ______________________________
Signature

______________________________ Date: ______________________________
Signature

Name: ______________________________
Phone: ______________________________
Email: ______________________________ SS No.: ______________________________
Forwarding Address (if different from property): ______________________________

Name: ______________________________
Phone: ______________________________
Email: ______________________________ SS No.: ______________________________
Forwarding Address (if different from property): ______________________________

Property Address: ______________________________

Caroline E. Kelsey
Attorney At Law

PRIVACY POLICY

We Are Committed to Representing You With Integrity. In order for Kelsey Law, PC to represent you, we will need to ask you for certain information from time to time that may be of a confidential nature, such as personal and/or financial information. We believe that you have a right to know how we will utilize and safeguard such information, and have adopted the following Privacy Policy in our office which governs all employees of Kelsey Law, PC in the use and handling of your personal information.

Limitations of Confidential Information. This Privacy Policy governs our use of information you provide to us; it does not govern information obtained from a public record or from any other person or entity.

Use of Information. Information that we ask of you will be used for our own legitimate business purposes. We will not release your information to third parties except as necessary to provide a product or service that you have requested of us, or as permitted by law. At times it may be necessary for us to provide nonpublic personal information listed above to one or more of our affiliated companies. Such affiliated companies include financial services providers, title insurers, property and casualty insurers, real estate sales companies, relocation companies, mortgage companies or companies involved in real estate services, such as appraisal companies, home warranty companies and escrow companies.

Former Clients. Even if you are no longer a client of Kelsey Law, PC, our Privacy Policy will continue to apply to you. We may store information indefinitely, including the period after which our attorney-client relationship has ceased. Such information may be used for any internal purpose, such as quality control or customer analysis, and may be provided to companies and entities affiliated with our firm as allowed and/or required by law.

Security of Confidential Information. We will use the highest degree of care to be sure that no unauthorized parties have access to any of your information. We restrict access to nonpublic personal information about you to those individuals and entities that need to know that information to provide products or services to you. We train and oversee our employees and agents to ensure that your information will be handled responsibly and in accordance with our Privacy Policy. After closing all files are transferred to a secure electronic database and all physical files are securely disposed. We maintain physical, electronic and procedural safeguards that comply with federal guidelines to guard your nonpublic personal information.

Authorization to Order Items Necessary for Closing. If Kelsey Law, PC is representing you as BUYER in this transaction, your signature below authorizes this firm to order a survey of the property you intend to purchase on your behalf. If Kelsey Law, PC is representing you as SELLER in this transaction, your signature below authorizes this firm to order mortgage payoff information from your current lender, and other payoff information from your creditors.

Settlement Statements. We will be providing settlement statements from your closing to the real estate brokers in the transaction.

______________________________ Signature
______________________________ Print Name
______________________________ Date
Social Security Number: ______________

______________________________ Signature
______________________________ Print Name
______________________________ Date
Social Security Number: ____________________

Property Address: ____