

SOFTPRO SELECT

RELEASE NOTES



MARCH, 2016

Testing Release Date: March 4, 2016

Production Release Date: March 18, 2016



MARCH RELEASE NOTES

TABLE OF CONTENTS

ALL STATES/SITES	5
DOCUMENTS	5
Escrow.....	5
1099-S / Substitute Form 1099-S.....	5
Additional Disbursements From Broker’s Commissions.....	6
ALTA Documents.....	6
CDF Statements.....	7
FIRPTA language, documents containing	7
Instruction to Transfer of Withholding Funds to Third Party	7
Notice of Settlement Agent Responsibility	8
Settlement Statements.....	8
REPORTS	9
Disbursement Summary.....	9
Disbursements by Payee	9
Initial Title Commitment Export	9
Ledger Transfer Activity	9
Orders by Revenue Source.....	10
Stale Dated Check Letter	11
Transaction Form	11
CALIFORNIA.....	12
DOCUMENTS	12
Escrow.....	12
Abandoned Property - Notify.....	12
593 Form (2016) - Tax Statement.....	12
Deeds	13
EI Bulk Sale of Business (EIS).....	14
EI Bulk Sale of Business w/Transfer of Liquor License (EIS)	14
EI Escrow Instructions (Express)	14
EI CAR 2000 Amendment (EIS).....	15
EI Escrow Instructions (Express)	16
Interspousal Transfer Deed SC.....	17
Interspousal Transfer Deed SC w/ PCOR	17
Recording and Policy Instructions (w/ Notes)	18
Recording and Policy Instructions (w/o Notes)	18
Request for Conditional Tax Clearance (Los Angeles County)	18
Title.....	19
ALTA 9.6.1-06 - Private Rights - Current Assessments	19
LOOKUP TABLES	20
Escrow Instruction Phrases – NOCAL ONLY	20
Escrow Instruction Phrases – SOCAL ONLY	21
FLORIDA.....	22



MARCH RELEASE NOTES

DOCUMENTS	22
Escrow.....	22
Affidavit (Supporting FinCEN GTO)	22
Authorization (HOA Estoppel)	22
Information Sheet (Internal)	23
Master Settlement Statement.....	24
Templates - All	24
ILLINOIS	25
DOCUMENTS	25
Escrow.....	25
Certification of Trust (760 ILCS 5/8.5)	25
Disclosure Statement.....	26
Limitation of Liability.....	26
Limited Power of Attorney (IN Sales Disclosure Form).....	27
Stop Payment Request - OAC	27
REPORTS	28
Aggregate Recording Charge	28
Title Production	28
OREGON.....	29
DOCUMENTS	29
Escrow.....	29
Affidavit (ALTA)	29
Bill of Sale	30
Deed (Affiant's).....	30
Deed (Affiant's), Legal.....	30
Deed (Purchaser's Assignment of Real Estate Contract)	30
Deed (Purchaser's Assignment of Real Estate Contract), Legal	30
Open Order Sheet (Order Summary).....	31
Open Order Sheet (Order Summary) - Ltr	31
Open Order Sheet (Order Summary) with Notes	31
Open Order Sheet (Order Summary) with Notes - Ltr	31
Preliminary Report	32
Preliminary Report (Schedule A).....	32
Preliminary Report Approval - Seller.....	33
REPORTS	34
Open/Closed Orders Report	34
Weekly Summary of Business Worksheet.....	34
TEXAS.....	35
DOCUMENTS	35
Escrow.....	35
Buyer Preclosing Information	35
FIRPTA - Notice of Settlement Agent Responsibility (TX).....	35



MARCH RELEASE NOTES

Seller Preclosing Information	36
WASHINGTON	37
DOCUMENTS	37
Escrow.....	37
King County Advance Tax Request	37
Questionnaire	38
Questionnaire, Letter.....	38
Questionnaire (Buyer-Borrower)	38
Questionnaire (Buyer-Borrower), Letter	38
Questionnaire (Seller)	38
Questionnaire (Seller), Letter	38
Snohomish County Advance Tax Request	39
LOOKUP TABLES	40
Escrow Instruction Phrases.....	40
TECHNICAL NOTES (FOR LOCAL IT/SUPPORT).....	41
DOCUMENTS	41
1099 Real Estate Reporting Solicitation	41
593 Form (2016) - Tax Statement.....	41
FIRPTA - Waiver of Settlement Agent Responsibility	41
Verification of Trust	41



MARCH RELEASE NOTES

ALL STATES/SITES

DOCUMENTS

Escrow

1099-S / Substitute Form 1099-S

NEW/MOD MOD	REQUESTED BY SoftPro	FOOTPRINTS No(s). n/a	TFS No(s). 313553	FILE NAME (NEW ITEMS ONLY)
----------------	-------------------------	--------------------------	----------------------	----------------------------

Updated text for 2016

Left side text:

Instructions for Transferor

For sales or exchanges of certain real estate, the person responsible for closing a real estate transaction must report the real estate proceeds to the Internal Revenue Service and must furnish this statement to you. To determine if you have to report the sale or exchange of your main home on your tax return, see the instructions for Schedule D (Form 1040). If the real estate was not your main home, report the transaction on Form 4797, Form 6252, and/or the Schedule D for the appropriate income tax form. If box 4 is checked and you received or will receive like-kind property, you must file Form 8824.

Federal mortgage subsidy. You may have to recapture (pay back) all or part of a federal mortgage subsidy if **all** the following apply.

- You received a loan provided from the proceeds of a qualified mortgage bond or you received a mortgage credit certificate.
- Your original mortgage loan was provided after 1990.
- You sold or disposed of your home at a gain during the first 9 years after you received the federal mortgage subsidy.
- Your income for the year you sold or disposed of your home was over a specified amount.

This will increase your tax. See Form 8828 and Pub. 523.

Transferor's identification number. For your protection, this form may show only the last four digits of your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN). However, the issuer has reported your complete identification number to the IRS.

Right side text:

Account number. May show an account or other unique number the filer assigned to distinguish your account.

Box 1. Shows the date of closing.

Box 2. Shows the gross proceeds from a real estate transaction, generally the sales price. Gross proceeds include cash and notes payable to you, notes assumed by the transferee (buyer), and any notes paid off at settlement. Box 2 does not include the value of other property or services you received or will receive. See *Box 4*.

Box 3. Shows the address or legal description of the property transferred.

Box 4. If marked, shows that you received or will receive services or property (other than cash or notes) as part of the consideration for the property transferred. The value of any services or property (other than cash or notes) is not included in box 2.

Box 5. Shows certain real estate tax on a residence charged to the buyer at settlement. If you have already paid the real estate tax for the period that includes the sale date, subtract the amount in box 5 from the amount already paid to determine your deductible real estate tax. But if you have already deducted the real estate tax in a prior year, generally report this amount as income on the "Other income" line of the appropriate income tax form. For more information, see Pub. 523, Pub. 525, and Pub. 530.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Additional Disbursements From Broker's Commissions				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	CT King\Pierce	n/a	312873	SSCORPD5491.rpt SSCORPD5492.rpt
<p>Added the following Additional Disbursements From Broker's Commissions</p> <p>Additional Disbursements From Broker's Commissions Additional Disbursements From Broker's Commissions (without Amts)</p> <p>Created custom versions of out of the box documents</p> <ul style="list-style-type: none"> Added a drop down option to control the existing signatures: <ul style="list-style-type: none"> "Print acknowledgement signatures:" options: No Signatures; Buyers; Sellers (Default); Buyers & Sellers 				

[Back to Table of Contents](#)

ALTA Documents				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	Service Link	n/a	313506	SSCORPD5496.rpt SSCORPD5497.rpt SSCORPD5498.rpt
<p>Added the following ALTA Settlement Statements</p> <p>ALTA Combined/Cash Settlement Statement (CDF) ALTA Settlement Statement Buyer (CDF) ALTA Settlement Seller (CDF)</p> <p>Started with out of box ALTA statements:</p> <ul style="list-style-type: none"> Added a new option "Escrow Officer/Closer with Digital Signature" to "Escrow contact" drop down and when selected print the EO signature image from SPAdmin. Same logic as the current "Escrow Officer/Closer" option but added the signature image from SPAdmin. Added bill code logic for revenue sharing; including the two new sets of bill codes. (ABI/ABE & REF/REO) Amounts for bill code combinations of RFI/RFE, NBE/NBI, ABI/ABE or REF/REO (IL Only "SFA") are not displayed if the total of all RFI/RFE, NBE/NBI, ABI/ABE or REF/REO amounts is \$0.00 (NBE/NBI, ABI/ABE or REF/REO = Revenue Sharing Expense/Income; RFI/RFE are historical bill codes); 				

[Back to Table of Contents](#)



MARCH RELEASE NOTES

CDF Statements

NEW/MOD MOD	REQUESTED BY TX, WA	FOOTPRINTS No(s). n/a	TFS No(s). 311733,31369,311969	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> Relabeled this CF "Text to be printed at bottom of HUD attachment page" to "Text to be printed at bottom of HUD attachment page/CDF Settlement Statements" When populated print entered text above the signatures, like the HUD statements do with the HUD-1, page 2 text Added "CDF #5" to the CDFs to include drop down Deposit (L.01) - when retained by is not LB/SB contact the portion retained is greyed out and shows as zero on the statements, when this happens do not show the portion retained amount. 				

[Back to Table of Contents](#)

FIRPTA language, documents containing

NEW/MOD Mod	REQUESTED BY Settlement	FOOTPRINTS No(s). n/a	TFS No(s). Multiple*	FILE NAME (NEW ITEMS ONLY)
<p>Per Escrow Tech Memos 120-2010 and 65-2006 (both revised February 2016), updated documents to reflect up-to-date language as provided by Settlement.</p> <p>* 314367, 314377, 314382, 317139, 317145, 317149, 317158, 317165, 317168, 317179</p>				

[Back to Table of Contents](#)

Instruction to Transfer of Withholding Funds to Third Party

NEW/MOD New	REQUESTED BY Settlement	FOOTPRINTS No(s). n/a	TFS No(s). 314362	FILE NAME (NEW ITEMS ONLY) SSCORPD5499.doc
----------------	----------------------------	--------------------------	----------------------	---

New document. Render to view complete document.



Fidelity National Title
Company of Oregon

**INSTRUCTION TO TRANSFER OF
WITHHOLDING FUNDS TO THIRD PARTY**

Date: March 1, 2016
To: Settlement Agent ONE
Escrow No.: AMGCDFNF-WRB

Upon close of the above referenced escrow, **Belinda Buyer and Barry Buyer** ("Buyer") and **Stanley Middle Seller and Stephanie Middle Seller** ("Seller") authorize Escrow Holder to transfer Fifteen Thousand Three And No/100 Dollars (\$15,003.00) of the proceeds due Seller to:

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Notice of Settlement Agent Responsibility

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Settlement	n/a	314388	SSCORPD5500.doc

New document. Render to view complete document. Added per Escrow Tech Memo 120-2010 (revised Feb 2016). Replaces FIRPTA - Waiver of Settlement Agent Responsibility.

 Fidelity National Title Company of Oregon	NOTICE OF SETTLEMENT AGENT RESPONSIBILITY
Wayne Buehrer, Configuration Analyst Settlement Agent ONE 1234 Settlement St., Suite 123 Portland, OR 97211 Phone: (444)333-2222 Fax: (222)444-5555	Date: March 1, 2016 Ref. No.: SETT-1234567 Escrow No.: AMGCDFNF-WRB Seller(s): Stanley Middle Seller and Stephanie Middle Seller Buyer(s): Belinda Buyer and Barry Buyer Property: 1234 Property St., Suite 1234 Santa Monica, CA 90411 1 Street rd Durham, NC 27713
The Foreign Investment in Real Property Tax Act (FIRPTA), Title 26 U.S.C., Section 1445, and the regulations	

[Back to Table of Contents](#)

Settlement Statements

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	SoftPro	n/a	315163	

Updated both HUD and CDF Statements with new bill codes for revenue sharing

- Added ABI/ABE and REF/REO to the amounts to suppress when zero.
- Amounts for bill code combinations of RFI/RFE, NBE/NBI, ABI/ABE or REF/REO (IL Only "SFA") are not displayed if the total of all RFI/RFE, NBE/NBI, ABI/ABE or REF/REO amounts is \$0.00 (NBE/NBI, ABI/ABE or REF/REO = Revenue Sharing Expense/Income; RFI/RFE are historical bill codes);
- Updated the programming notes report

[Back to Table of Contents](#)



MARCH RELEASE NOTES

REPORTS

Disbursement Summary				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	NC	n/a	325502	
<ul style="list-style-type: none"> Corrected issue when a transaction does not have a contact selected it is not showing on the disbursement summary 				

[Back to Table of Contents](#)

Disbursements by Payee				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	IL	n/a	313381	
<ul style="list-style-type: none"> Added a new parameter <ul style="list-style-type: none"> "Marketing source filter" with options of "All; Marketing Source Only; Non-Marketing Source Only" 				

[Back to Table of Contents](#)

Initial Title Commitment Export				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	Julie Likkel	n/a	316751	
<ul style="list-style-type: none"> Removed vender ref# and replace with escrow# 				

[Back to Table of Contents](#)

Ledger Transfer Activity				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	SoftPro	n/a	314051	
<ul style="list-style-type: none"> Added a check box "Format for Excel export" <ul style="list-style-type: none"> Defaulted unchecked after "Page break per branch" Included these columns: <ul style="list-style-type: none"> Branch Escrow Officer/Closer Transfer Type Reference Number Trust Date Ledger To Ledger From Property address (property 1 of Ledger From order) Buyer name (Buyer payees names of Ledger From order) Amount 				

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Orders by Revenue Source

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	IL	n/a	313189	SSCORP5276.rpt

Added a new report based on closed order by marketing source (SSCORP5154.rpt - Opened/Closed Orders by {Selection} - closed/grouped by mkt source company).

- same grouping/columns/logic as closed but add a 1st group for each revenue operation (like fees by selection)
- report revenue totals will match SSCORP5154.rpt with the same criteria

General:

Title: Closed Orders by Revenue Operation

Tree location – add to all trees order reports

Parameters:

- -Revenue date from (default 1st of month)
- Revenue date though (default previous business day)
- Group by - options: Branch (default); Branch County, Branch, Escrow Officer/Closer; Branch, Escrow Officer/Closer; Escrow Assistant; Escrow Office; Escrow Officer/Closer; Escrow Officer/Closer, Branch; Escrow Officer/Closer, Escrow Assistant; Marketing Source Company; Sales Rep-combined; Sales Rep-separated; Sales Rep-separated, Branch; Sales Rep-separated, Escrow Officer/Closer, Branch; Title Officer/Examiner
- Include sales reps on marketing source only
- Commercial/Residential filter - options: Commercial and Residential (default); Commercial Only; Residential Only
- Show property, escrow assistant & premium (check box - default uncheck)
- Format for Excel export (check box - default uncheck)
- Show revenue details (check box - default uncheck)
- Mkt source code or name contains (text box)
- Branch (picklist)
- Escrow officer/closer (picklist)
- Escrow assistant (picklist)
- Title officer/examiner (picklist)
- Sales rep (picklist)
- Order type (picklist)
- Product type (picklist)
- Order transaction type (picklist)
- Branch flash code
- Show report programming notes
- Comments

Groups:

- Revenue Operation (always first group)
- 2nd & 3rd based on "Group by" selection

Columns:

- Order Number
- Trans Type
- Order Type
- Closed Date
- Escrow Officer/Closer
- Title Officer/Examiner
- Sales Rep
- Branch (lookup code only)
- Escrow Office
- Ref. Number



MARCH RELEASE NOTES

- Title revenue
- Escrow Revenue
- Other Revenue
- Referral Revenue
- Total Revenue

Logic:

- all orders with any revenue in a date
- an order can appear in multiple revenue operation groups
- Show revenue details - includes each revenue detail amount (Date, Bill code, Payee, amounts (title, escrow, other, referral & total))

"Revenue Operation" =

o for invoices, TP/END bill codes the portion of the UWOracleOpCode_FNF# custom field on the Invoice Remit To contact that follows the Underwriter contact's (from the {Order.Title.TitleInsurancePremiumCalculation.Underwriter.LookupCode}) UndCode_FNF# field value. Other bill codes the portion of the UWOracleOpCode_FNF# that follows the first underwriter code in the string.

o for register transactions, TP/END bill codes the portion of the UWOracleOpCode_FNF# custom field on the Payee contact that follows the Underwriter contact's (from the policy, {Order.Title.TitleInsurancePremiumCalculation.Underwriter.LookupCode}) UndCode_FNF# field value (when fees have been diverted to the Payee, the UWOracleOpCode_FNF# custom field of the diverting contact is used; if the diverting contact has no UWOracleOpCode_FNF# custom field (ex: Underwriter), then the first other contact with a UWOracleOpCode_FNF# custom field is used). Other bill codes the portion of the UWOracleOpCode_FNF# that follows the first underwriter code in the string.

Sorting:

- Order Number
- With revenue details, Bill Code, Payee

[Back to Table of Contents](#)

Stale Dated Check Letter

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	EPU DIV I&II		314776	
<ul style="list-style-type: none"> • Added user phone number and fax number back onto letter 				

[Back to Table of Contents](#)

Transaction Form

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	LTC		315477	

This logic applies only for "LTC BAY AREA"

On receipt of funds

- Use the original posters name
- Show the digital signature

[Back to Table of Contents](#)



MARCH RELEASE NOTES

CALIFORNIA

DOCUMENTS

Escrow

Abandoned Property - Notify

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Settlement	n/a	317309	SCA0002796.doc

New document. Render to view complete document.



[Back to Table of Contents](#)

593 Form (2016) - Tax Statement

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT San Mateo	n/a	317088	

Removed the prompt for buyer when rendering this document.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Deeds

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT San Bernardino	n/a	314730	

Revised logic within deeds to change label to "TRA:" when the property is located in Riverside County, California.

After Recording Return to and
Until a change is requested,
Tax Statements shall be sent to:
Belinda Buyer and Barry Buyer
1234 Property St., Suite 1234
Santa Monica, CA 90411

APN/Parcel ID(s): Prop1Parcel1
TRA: 123-tax

SPACE ABOVE THIS LINE FOR RECORDER'S USE

STATUTORY BARGAIN AND SALE DEED

EXHIBIT "A" Legal Description

For APN/Parcel ID(s): Prop1Parcel1
For TRA: 123-tax

THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE CITY OF SANTA MONICA, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA AND IS DESCRIBED AS FOLLOWS:

[Back to Table of Contents](#)

MARCH RELEASE NOTES

EI Bulk Sale of Business (EIS)

EI Bulk Sale of Business w/Transfer of Liquor License (EIS)

EI Escrow Instructions (Express)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement	n/a	316740	

Replaced the Certificate of Authority License number with License Number field on Settlement Agent contact screen.

BEFORE



Chicago Title Company conducts escrow business under a **Certificate of Authority No. 350** issued by the California Department of Insurance.

AFTER



Chicago Title Company conducts escrow business under **License No. LIC1234567890** issued by the California Department of Insurance.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

EI CAR 2000 Amendment (EIS)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	SoCal	n/a	316717	

Fixed typo under General Instructions - Item 3 from "the" to "that".

2. The undersigned Buyer hands you herewith Preliminary Change of Ownership Report as provided for in Section 480.34 of the Revenue and Taxation Code, State of California which you are to cause to be filed concurrently with the Deed in our favor. If form is rejected by the County, a surcharge may be imposed by said County and is to be paid by buyer herein.
3. Checks to be issued at Close of Escrow: I/We the undersigned Buyer/Borrower/Seller hereby acknowledge that we are aware that Settlement Agent ONE will issue a check payable to the undersigned in payment of Seller's proceeds/Borrower's proceeds or Buyer's excess deposit refund. I/We further acknowledge and agree that said check will be presented to the bank for deposit as soon as possible after receipt, and collection and payment of the funds will only be done through the regular banking channels.

In addition, in the event there are liens to be paid on the undersigned's behalf, we hereby also acknowledge that I/we will not use the pay-by-phone electronic system to pay/collect the funds as Settlement Agent ONE will not honor such payments. The parties herein agree to be responsible for any stop payment and reissue charges and/or losses that may be incurred in connection with any and all electronic debits to Settlement Agent ONE's Trust Accounts.

[Back to Table of Contents](#)

MARCH RELEASE NOTES

El Escrow Instructions (Express)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement	n/a	316740	

Replaced the Certificate of Authority License number with License Number field on Settlement Agent contact screen.

BEFORE



Chicago Title Company conducts escrow business under a **Certificate of Authority No. 350** issued by the California Department of Insurance.

AFTER



Chicago Title Company conducts escrow business under **License No. LIC1234567890** issued by the California Department of Insurance.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Interspousal Transfer Deed SC

Interspousal Transfer Deed SC w/ PCOR

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Santa Clara	n/a	314345	

Revised to not pull in transfer tax information if the exempt from Documentary Transfer Tax checkbox is marked.

Select if document is exempt from Documentary Transfer Tax

INTERSPOUSAL TRANSFER DEED
(Excluded from reappraisal under California Constitution Article 13 A Section 1 et seq.)

The undersigned grantor(s) declare(s)
Documentary transfer tax is \$300.00. City tax is \$100.00.

Unincorporated area: City of _____

- Computed on the consideration or value less liens or encumbrances remaining at time of sale.

This is an Interspousal Transfer and not a change in ownership under Section 63 of the Revenue and Taxation Code and Grantor(s) has (have) checked the applicable exclusion from reappraisal:

If checkbox is marked, NO Documentary Transfer Tax information pulls in

INTERSPOUSAL TRANSFER DEED
(Excluded from reappraisal under California Constitution Article 13 A Section 1 et seq.)

The undersigned grantor(s) declare(s)

Unincorporated area: City of _____

- Computed on the consideration or value less liens or encumbrances remaining at time of sale.

This is an Interspousal Transfer and not a change in ownership under Section 63 of the Revenue and Taxation Code and Grantor(s) has (have) checked the applicable exclusion from reappraisal:

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Recording and Policy Instructions (w/ Notes)

Recording and Policy Instructions (w/o Notes)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Kern	n/a	314712	

Modified coding for Property Address section to pull all addresses associated with the Commitment rather than prompting user to select only one address.

Please enter order for Policy of Title Insurance as follows:

	Liability	Premium
ALTA Owner's Policy 2006	\$ 500,000.00	\$ 1,500.00
Endorsement(s)		
ALTA Loan Policy 2006	\$ 400,000.00	\$ 400.00
Endorsement(s)		
Location 2006 - ALTA 22-06	\$22.00	
ALTA Loan Policy 2006	\$ 50,000.00	\$ 0.00
Endorsement(s)		

Property Address: 1234 Property St., Suite 1234, Santa Monica, CA 90411
1 Street Rd, Carmichael, CA 95609

Present Owner's Name: Stanley Middle Seller and Stephanie Middle Seller

[Back to Table of Contents](#)

Request for Conditional Tax Clearance (Los Angeles County)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	SoCal	n/a	313540	SCA0002793.doc

New document. Render to view complete document.



Fidelity National Title
Company of Oregon

1234 Settlement St., Suite 123
Portland, OR 97211
Phone: (444)333-2222 / Fax: (222)444-5555

Date: March 1, 2016
Escrow No.: AMGCDFNF-WRB

Please consider this our request for your preparation of the Conditional Tax Clearance Certificate, or if taxes are paid, a Tax Clearance Certificate.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Title

ALTA 9.6.1-06 - Private Rights - Current Assessments

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Underwriting	n/a	318486	

This endorsement has been removed. Per instruction from Underwriting counsel, this form should not be filed in California.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

LOOKUP TABLES

Escrow Instruction Phrases – NOCAL ONLY

NEW/MOD Mod	REQUESTED BY Amy Levy	FOOTPRINTS No(s). IN16000095541	TFS No(s). 315085
-----------------------	---------------------------------	---	-----------------------------

If Transaction Type is Purchase, the phrases will pull in 'Seller'; 'Buyer and Seller are':

Transaction type

Purchase

Refinance

Equity

Other

Code	Name
free01	FREE AND CLEAR

LIENS AND/OR ENCUMBRANCES: Seller hereby confirms that the subject property is free and clear of any liens or encumbrances. Seller further confirms that information regarding any and all liens, encumbrances and/or loan information has been fully disclosed to Escrow Holder.

Code	Name
specia01	SPECIAL RECORDING NOTICE

SPECIAL RECORDING NOTICE: In the event the documents in this escrow are recorded subsequent to the regular recording time of 8:00 a.m., Buyer and Seller are aware that funds may not or will not be available for disbursement for the payment of liens, proceeds or commission until the following business day and that no interest will be earned on such funds.

If the Transaction Type is not a Purchase, the phrases will now pull in 'Borrower'; 'Borrower is':

Transaction type

Purchase

Refinance

Equity

Other

Code	Name
free01	FREE AND CLEAR

LIENS AND/OR ENCUMBRANCES: Borrower hereby confirms that the subject property is free and clear of any liens or encumbrances. Borrower further confirms that information regarding any and all liens, encumbrances and/or loan information has been fully disclosed to Escrow Holder.

Code	Name
specia01	SPECIAL RECORDING NOTICE

SPECIAL RECORDING NOTICE: In the event the documents in this escrow are recorded subsequent to the regular recording time of 8:00 a.m., Borrower is aware that funds may not or will not be available for disbursement for the payment of liens, proceeds or commission until the following business day and that no interest will be earned on such funds.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Escrow Instruction Phrases – SOCAL ONLY

NEW/MOD Mod	REQUESTED BY Jeanette Haines	FOOTPRINTS No(s). N/A	TFS No(s). 317186
-----------------------	--	---------------------------------	-----------------------------

Codes prelim01 and prelim02 have been removed. Codes pre01 and pre02 should be used instead:

Code	Name
pre01	PRELIM APPROVAL - AUTOMATIC

PRELIMINARY REPORT APPROVAL: The closing of this escrow is contingent upon the Buyer's approval of the items in the preliminary report issued by Chicago Title Insurance Company dated **March 14, 2016**, including Covenants, Conditions and Restrictions, if any, on subject property, within **ten (10)** calendar days of Buyer's receipt thereof. If written disapproval of any matter is not delivered to Escrow Holder within the time specified above, then all such matters shall be deemed approved and this contingency satisfied.

<p>Commitment</p> <p>Enter the preliminary report effective date</p> <p>03/14/2016</p>	<p>Will prompt if the Commitment Effective Date is not entered, otherwise it will pull in the Commitment Effective Date</p>
<p>Enter the number of calendar days that buyer has to approve items</p> <p>10</p>	

Code	Name
pre02	PRELIM APPROVAL - IN WRITING

PRELIMINARY REPORT APPROVAL: The closing of this escrow is contingent upon the Buyer's approval of the items in the preliminary report issued by Chicago Title Insurance Company dated **March 14, 2016**, including Covenants, Conditions and Restrictions, if any, on subject property, within **ten (10)** calendar days from Buyer's receipt thereof. Such approval to be given to Escrow Holder in writing.

<p>Commitment</p> <p>Enter the preliminary report effective date</p> <p>03/14/2016</p>	<p>Will prompt if the Commitment Effective Date is not entered, otherwise it will pull in the Commitment Effective Date</p>
<p>Enter the number of calendar days that buyer has to approve items</p> <p>10</p>	

[Back to Table of Contents](#)



MARCH RELEASE NOTES

FLORIDA

DOCUMENTS

Escrow

Affidavit (Supporting FinCEN GTO)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	ServiceLink	n/a	316747	FLD1237.doc

New document. Render to view complete document.

SUPPORTING FinCEN GTO AFFIDAVIT

Escrow No.: [AMGCDFNF](#)

The Financial Crimes Enforcement Network ("FinCEN"), a bureau of the U. S. Department of Treasury, has issued Geographic Targeting Orders to various title insurance companies on or about January 13, 2016 ("Order"). A full copy of the Order is available on request. The Order requires this Company, including any subsidiaries and agents of the Company (defined in the Order as a "Covered Business"), to collect certain information with respect to certain transactions defined as "Covered Transactions" that are handled by the Covered Business.

[Back to Table of Contents](#)

Authorization (HOA Estoppel)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	FNT Florida	n/a	313551	FLD1236.doc

New document. Render to view complete document.



Fidelity National Title
Company of Oregon

HOA ESTOPPEL AUTHORIZATION

Date: March 1, 2016
Order No.: [AMGCDFNF](#)
Buyer(s): Belinda Buyer and Barry Buyer
Seller(s): Stanley Middle Seller and Stephanie Middle Seller

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Information Sheet (Internal)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Florida	n/a	315375	

Highlighted items added to document per request.

Payoff _____ \$ _____	Per Diem \$ _____	Good Thru _____
Loan No.: _____		
Payoff _____ \$ _____	Per Diem \$ _____	Good Thru _____
Loan No.: _____		
<input checked="" type="checkbox"/> Title Commitment _____		
<input type="checkbox"/> Survey _____		\$ _____
<input type="checkbox"/> Termite _____		\$ _____
<input type="checkbox"/> Condo/HOA _____		\$ _____
<input checked="" type="checkbox"/> 2nd Condo/HOA _____		\$ _____
<input type="checkbox"/> Home Warranty _____		\$ _____

<input type="checkbox"/> Prior Policy _____		\$ _____
<input checked="" type="checkbox"/> Deed Received _____		
<input type="checkbox"/> _____		\$ _____
NOTES _____		

Faxed Realtor Info Sheet Listing <input type="checkbox"/> Selling <input type="checkbox"/>		
Sent EMD Conf. _____		
Transaction Fees: Listing \$ _____		Selling \$ _____
Requested Bringdown _____		

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Master Settlement Statement				
NEW/MOD MOD	REQUESTED BY FT FL	FOOTPRINTS No(s). n/a	TFS No(s). 311037	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> Removed the line reference from the commission note when adjustments are entered No longer show the commission note when adjustments are entered 				

[Back to Table of Contents](#)

Templates - All				
NEW/MOD MOD	REQUESTED BY n/a	FOOTPRINTS No(s). n/a	TFS No(s). n/a	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> Reinstating the restricted access on default templates removed by previous update. <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <div style="border: 1px solid red; padding: 5px; display: inline-block;">BEFORE</div> <input type="checkbox"/> Restricted </div> <div style="text-align: center;"> <div style="border: 1px solid red; padding: 5px; display: inline-block;">AFTER</div> <input checked="" type="checkbox"/> Restricted </div> </div>				

[Back to Table of Contents](#)



MARCH RELEASE NOTES

ILLINOIS

DOCUMENTS

Escrow

Certification of Trust (760 ILCS 5/8.5)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Downstate IL	n/a	315407	ILD0470.doc

New document. Render to view complete document.

**CERTIFICATION OF TRUST
GIVEN PURSUANT TO 760 ILCS 5/8.5**

Name of Trust: **The Stephen Seller and Stephanie Seller Revocable Trust**

Date trust instrument was executed: **December 12, 2012**

Tax Identification Number of trust (SSN or EIN): **99-1234567**

Name(s) of settlor(s) of trust: _____

Name(s) of currently acting trustee(s): **Stephen Seller and Stephanie Seller**

Address(es) of currently acting trustee(s): **200 Seller Current Street, Anywhere, IL 99999**

Alternative statements as to co-trustees - please check and complete one (1):

This trust states that _____ of _____
co-trustee(s) are required to exercise the powers of the trustee.

The co-trustees authorized to sign or otherwise authenticate on behalf of the trust are:

There are no co-trustees authorized to sign or otherwise authenticate on behalf of the trust.

Name(s) of successor trustee(s): **Successor Trustee One, Successor Trustee Two, Successor Trustee Three
and Successor Trustee Four**

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Disclosure Statement				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT IL	n/a	317306	
<p>For FNT operations only, revised document to show blank lines for premium charges and fees.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Only those charges which may be paid by the party(ies) to whom this disclosure is made, are (were) disclosed herein. If there are additional parties who choose to utilize services from the above name company/business, there may be additional charges for those services.</p> <p style="text-align: right; margin-left: 200px;"> *Owner's Title Policy: \$ _____ *Mortgage Title Policy: \$ _____ Escrow or Closing Fee: \$ _____ Other Fees: _____ \$ _____ Total Estimated Charges: \$ _____ </p> </div>				

[Back to Table of Contents](#)

Limitation of Liability				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Downstate IL	n/a	313545	ILD0468.doc
<p>New document. Render to view complete document.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0; text-align: center;"> <p>EXHIBIT - LIMITATION LANGUAGE FOR LIMITATION TO AMOUNT OF FEE PAID FOR SEARCH</p> <p>You expressly agree and acknowledge that it is extremely difficult, if not impossible, to determine the extent of loss which could arise from errors or omissions in, or the Company's negligence in producing, the report. You recognize that the fee charged is nominal in relation to the potential liability which could arise from such errors or omissions or negligence. Therefore, you understand that the Company was not willing to proceed in the preparation and issuance of the requested report but for your agreement that the Company's liability is strictly limited.</p> </div>				

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Limited Power of Attorney (IN Sales Disclosure Form)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	FNT Metro	n/a	313545	ILD0469.doc

New document. Render to view complete document.



Fidelity National Title
Company of Oregon

**LIMITED POWER OF ATTORNEY FOR
PREPARATION, COMPLETION AND
SIGNATURE OF THE INDIANA
SALES DISCLOSURE FORM**

Date: March 1, 2016
Escrow No.: AMGCDFNF-WRB

Know all men by these presents that the undersigned Buyer(s) and Seller(s) do hereby make, constitute and appoint **Settlement Agent ONE** or its designated agent to be my/our true and lawful attorney, for me/us and in my/our name, place and stead to do any and all of the following:

[Back to Table of Contents](#)

Stop Payment Request - OAC

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro	n/a	313543	

Document now pulls in the cleared date for the check request.

Status	Type	Ref. Number	Trans. Date	Amount	Payee/Payor	CDF	Cleared Date	Dep. Number	Medium	Trust Acct.
Disbursements										
Posted	Check	9998	09/16/2015	\$47.52	Payoff Lender	1	02/23/2016		Check	ILCMTBA9144

STOP PAYMENT REQUEST - OAC

Please immediately process a stop payment on the following check:

Check No.: 9998
 Bank Name: Test Bank
 Amount: \$47.52
 Payable to: Payoff Lender
 Check Dated: September 16, 2015
 Cleared Dated: February 23, 2016
 Reason: wrong amount
 Attachment: Copy of Check

[Back to Table of Contents](#)



MARCH RELEASE NOTES

REPORTS

Aggregate Recording Charge				
NEW/MOD MOD	REQUESTED BY IL	FOOTPRINTS No(s).	TFS No(s). 315620	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">Use bill code RCF to pull posted amounts				

[Back to Table of Contents](#)

Title Production				
NEW/MOD MOD	REQUESTED BY CT IL	FOOTPRINTS No(s).	TFS No(s). 316407	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">Added "Task contains "T07e. Exam Completed - CPU"" as a turn time start				

[Back to Table of Contents](#)

MARCH RELEASE NOTES

OREGON

DOCUMENTS

Escrow

Affidavit (ALTA)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Portland	n/a	313535	

Added logo and legal description to the document.


CHICAGO TITLE COMPANY
←

ALTA AFFIDAVIT

STATE OF _____ Policy No.: MS Test CDF OR1SA
COUNTY OF _____

I/We, the undersigned, under oath, state:

1. I/We have exclusive possession of the following described real property:
SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

EXHIBIT "A"
Legal Description

THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH, STATE OF OREGON AND IS DESCRIBED AS FOLLOWS:
This is the Escrow Legal for Property 1.


CHICAGO TITLE COMPANY
←

ALTA AFFIDAVIT

STATE OF _____ Policy No.: MS Test CDF OR1SA
COUNTY OF _____

I/We, the undersigned, under oath, state:

1. I/We have exclusive possession of the following described real property:
→ THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH, STATE OF OREGON AND IS DESCRIBED AS FOLLOWS:
This is the Escrow Legal for Property 1.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Bill of Sale

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	n/a	316319	

Updated document per State Counsel.

BILL OF SALE

Stanley Seller ("Seller"), for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, does hereby bargain, sell, transfer, convey and deliver to Bette Buyer ("Buyer"), its successors and/or assigns the following described property ("the Property"):

[Back to Table of Contents](#)

Deed (Affiant's)

Deed (Affiant's), Legal

Deed (Purchaser's Assignment of Real Estate Contract)

Deed (Purchaser's Assignment of Real Estate Contract), Legal

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	n/a	315389	

Updated the warning/disclosure to show the most current language citing the Oregon Laws 2010.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

- [Open Order Sheet \(Order Summary\)](#)
- [Open Order Sheet \(Order Summary\) - Ltr](#)
- [Open Order Sheet \(Order Summary\) with Notes](#)
- [Open Order Sheet \(Order Summary\) with Notes - Ltr](#)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	TT Portland	n/a	317198	

Modified so that if two // (forward slashes) are entered in the Project field, the field will show on the document under the Order No.

	Fidelity National Title* Insurance Company	OPEN ORDER SHEET (ORDER SUMMARY)
Title Officer/Examiner: Carly L Robidoux		20150206-MS Test OR
carly.robidoux@softprocorp.com		
Escrow Officer: Wayne Buehrer		PROJECT NAME//GREEN
wayne.buehrer@SoftProCorp.com		

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Preliminary Report

Preliminary Report (Schedule A)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Portland	IN16000100798	316310	

Revised document to not show the individual associated with the Settlement Agent contact when selected for the "Prepared To" field on the Commitment, Schedule A screen. When another contact, like Listing Agent, is chosen, it will pull the individual name.

PRELIMINARY REPORT

ESCROW OFFICER: Wayne Buehrer
TITLE OFFICER: Brad Bivens

ORDER NO.: AMGCDFFNF

TO: The Listing Agent
Jenny Listing
3424 Agent Way
Portland, OR 97211

Prepared For

	Code	Name
▶	A	Chicago Title
*		

PRELIMINARY REPORT

ESCROW OFFICER: Wayne Buehrer
TITLE OFFICER: Brad Bivens

ORDER NO.: AMGCDFFNF

TO: Chicago Title
1738 Settlement Way
Portland, OR 97205

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Preliminary Report Approval - Seller

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	TT Portland	n/a	317374	

Changed document to pull Escrow Office address.

Wayne Buehrer, Configuration Analyst
Chicago Title
1234 Escrow Way
Portland, OR 97224
Phone: (757)856-9652 Fax: (152)396-5211

Date: March 16, 2016
Ref. No.: TITLE-123456
Escrow No.: AMGCDFNF-WRB
Property: 1234 Property St., Suite 1234
Santa Monica, OR 90411

[Back to Table of Contents](#)



MARCH RELEASE NOTES

REPORTS

Open/Closed Orders Report				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	CT Portland		313477	SSCORP5277.rpt
<ul style="list-style-type: none"> Copied Vancouver Open/Closed Orders report and modified programming notes. 				

[Back to Table of Contents](#)

Weekly Summary of Business Worksheet				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	OR		314953	
Indirect Order counts will now include: <ul style="list-style-type: none"> Limited Coverage Policy (LCP), Fidelity Lenders Abbreviated Guarantee (FLAG), Lot Book Report (LOTBOOK), Chain of Title (CHAIN), Search Package (SRCHPK) and Uninsured (UI). Programming Notes indicate "Customer Service orders (product type) are not included in the orders counts..." Wild Recording (WILDREC) to also <i>not</i> be counted, in addition to Customer Service. 				

[Back to Table of Contents](#)



MARCH RELEASE NOTES

TEXAS

DOCUMENTS

Escrow

Buyer Preclosing Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Austin	n/a	316314	

Modified to read "spouses" instead of "husband and wife"

Buyer Marital Status

- Married - both spouses shown above as "Buyer"
- Married - spouse's full legal name: _____
- Single (if more than one buyer, specify for each)
- None of the above marital statements describes my/our marital status. (Note: Please contact the title company to provide additional information.)

Does this transaction involve a mobile home/manufactured housing unit? Yes No

[Back to Table of Contents](#)

FIRPTA - Notice of Settlement Agent Responsibility (TX)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Settlement	n/a	314388	SSTXD00237.doc

New document. Render to view complete document. Added per Escrow Tech Memo 120-2010 (revised Feb 2016). Replaces FIRPTA - Waiver of Settlement Agent Responsibility.



Fidelity National Title
Company of Oregon

NOTICE OF SETTLEMENT AGENT RESPONSIBILITY

Wayne Buehrer, Configuration Analyst
Settlement Agent ONE
1234 Settlement St., Suite 123
Portland, OR 97211
Phone: (444)333-2222 Fax: (222)444-5555

Date: March 1, 2016
Ref. No.: SETT-1234567
Escrow No.: AMGCDFNF-WRB
Seller(s): Stanley Middle Seller and Stephanie Middle Seller
Buyer(s): Belinda Buyer and Barry Buyer
Property: 1234 Property St., Suite 1234
Santa Monica, CA 90411
1 Street rd
Durham, NC 27713

The Foreign Investment in Real Property Tax Act (FIRPTA), Title 26 U.S.C., Section 1445, and the regulations

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Seller Preclosing Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Austin	n/a	316314	

Modified to read "spouses" instead of "husband and wife"

Seller Marital Status

- Married - both spouses shown above as "Seller"
- Married - spouse's full legal name: _____
- Single (if more than one seller, specify for each)
 - Single when acquired property and have remained single
 - Married when acquired property - marriage ended in divorce on or about _____, filed in _____ County and _____ State. (Note: Copy of divorce decree may be required for examination and possible title requirements.)
 - Married when acquired - marriage ended in death of spouse on or about _____
 - Spouse did not leave a will or the will was not probated. (Note: Please contact title company to provide additional information.)
 - Spouse left a will which was probated in _____ County and _____ State. (Note: Copy of probate may be required for examination and possible title requirements.)
 - None of the above marital statements describes my/our marital status. (Note: Please contact the title company to provide additional information.)

[Back to Table of Contents](#)



MARCH RELEASE NOTES

WASHINGTON

DOCUMENTS

Escrow

King County Advance Tax Request

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Everett	IN16000101025	316307	WA00001013.doc

New document. Render to view complete document.

↓FOR KING COUNTY DEPARTMENT OF ASSESSMENTS INTERNAL USE ONLY↓				
Acct Number:	QC #:	Year AV:	Future Status:	Processed By:
King County Department of Assessments 500 4 th Avenue, Room 736 Seattle, WA 98104-2384 Phone: (206) 296-5126 Fax: (206) 296-0107 Email: personal.property@kingcounty.gov				
KING COUNTY DEPARTMENT OF ASSESSMENTS ADVANCE TAX REQUEST FORM				
Please provide the information requested on this form in the spaces below. A separate form should be completed for each account for which a tax statement is required. Attach the appropriate bill of sale showing breakdown of sales price (i.e., equipment, inventory, intangibles, etc.) with related dollar values. If you have questions, please call (206) 296-5126.				

[Back to Table of Contents](#)



MARCH RELEASE NOTES

- Questionnaire
- Questionnaire, Letter
- Questionnaire (Buyer-Borrower)
- Questionnaire (Buyer-Borrower), Letter
- Questionnaire (Seller)
- Questionnaire (Seller), Letter

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Tacoma	n/a	316300	

Updated the heading to read "Questionnaire and Authorization" as well as added 1031 question to the seller version.



QUESTIONNAIRE AND AUTHORIZATION

Escrow No.: AMGCDFNF-WRB **Seller(s):** Stanley Seller
Property: 1234 Property St., Suite 1234 **Buyer(s):** Bette Buyer
 Seattle, WA 98146
 1 Street Rd
 Seattle, WA 98146, etc.

Will you be using a Power of Attorney? Yes No If your answer is yes:

Who is giving Power of Attorney? _____

Who is signing on your behalf? _____

If the Power of Attorney is not already recorded, please provide us with a copy.

If the Power of Attorney is recorded, please provide name of the county in which it is recorded: _____

Will you be doing a 1031 exchange? Yes No

Are you in bankruptcy? Yes No If your answer is yes:

What type of bankruptcy? 13 11 Bankruptcy Case No.: _____

Attorney Contact Information: _____

[Back to Table of Contents](#)



MARCH RELEASE NOTES

Snohomish County Advance Tax Request

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Everett	IN16000101025	316307	WA00001012.doc

New document. Render to view complete document.

SNOHOMISH COUNTY ASSESSOR'S OFFICE PERSONAL PROPERTY DEPARTMENT
 NOTIFICATION OF
BUSINESS SALE/TRANSFER/BANKRUPTCY
ADVANCE TAX REQUEST

INSTRUCTIONS: Complete a separate form for each business or account requiring a tax statement. Provide a bill of sale showing breakdown of sales (i.e., equipment, inventory, intangibles, etc) with related dollar values. Fax to 425-388-3961 or mail to Assessors Office, Personal Property Dept, 3000 Rockefeller Ave MS 510, Everett, WA 98201 or email to contact.personalproperty@snoco.org. For questions call 425-388-3656 or email to the previously stated address.

This form is available at web site: <http://assessor.snoco.org>

[Back to Table of Contents](#)



MARCH RELEASE NOTES

LOOKUP TABLES

Escrow Instruction Phrases

NEW/MOD Mod	REQUESTED BY CT Seattle	FOOTPRINTS No(s). IN16000065197	TFS No(s). 315119
-----------------------	-----------------------------------	---	-----------------------------

Code	Name
title01	TITLE FROM OTHER COMPANY

Revised to replace the Title Company and Underwriter Name with the Escrow Office Name:

BEFORE

TITLE FROM OTHER COMPANY: In the above referenced escrow, the parties have chosen Title Company Name to handle the Title Insurance and have ordered the commitment and policy outside of escrow. Escrow Office Name is not underwritten by Underwriter Name. In consideration of Escrow Office Name company's office agreeing that its Escrow Officer may close said transaction, even though no Title Insurance is being purchased from **Title Company Name or Underwriter Name**, the parties agree as follows:

- i. Escrow Office Name and its employees shall have no responsibility for independently verifying the accuracy of any information shown in the Title Company Name and Underwriter Name commitment and/or policy. In its escrow function, Escrow Office Name will rely upon the accuracy and completeness of said commitment and/or policy and shall have no liability to the parties for such reliance. Parties agree to supply escrow officer with copies of all commitments, updates, supplementals, and policies for purposes of closing said transaction.
- ii. The parties affirmatively state that **Title Company Name and Underwriter Name have** advised them of its willingness to issue a Commitment for Title Insurance in this transaction. The parties have chosen of their own free will and with the opportunity to consult with counsel of their choice to utilize another title company.

AFTER

TITLE FROM OTHER COMPANY: In the above referenced escrow, the parties have chosen Title Company Name to handle the Title Insurance and have ordered the commitment and policy outside of escrow. Escrow Office Name is not underwritten by Underwriter Name. In consideration of Escrow Office Name company's office agreeing that its Escrow Officer may close said transaction, even though no Title Insurance is being purchased from **Escrow Office Name**, the parties agree as follows:

- i. Escrow Office Name and its employees shall have no responsibility for independently verifying the accuracy of any information shown in the Title Company Name and Underwriter Name commitment and/or policy. In its escrow function, Escrow Office Name will rely upon the accuracy and completeness of said commitment and/or policy and shall have no liability to the parties for such reliance. Parties agree to supply escrow officer with copies of all commitments, updates, supplementals, and policies for purposes of closing said transaction.
- ii. The parties affirmatively state that **Escrow Office Name has** advised them of its willingness to issue a Commitment for Title Insurance in this transaction. The parties have chosen of their own free will and with the opportunity to consult with counsel of their choice to utilize another title company.

[Back to Table of Contents](#)



MARCH RELEASE NOTES

TECHNICAL NOTES (FOR LOCAL IT/SUPPORT)

DOCUMENTS

Any new documents in this build are listed in the Title and/or Escrow User Release Notes. Due to the state-specific “All Documents” tree, these new documents are automatically available to the users upon the push to test or production.

However, those new documents may also need to be added to the operation specific tree(s) for packaging and other purposes. This is at your discretion.

1099 Real Estate Reporting Solicitation			
NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
-	None	All	
Removed per Settlement.			

[Back to Table of Contents](#)

593 Form (2016) - Tax Statement			
NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
-	None at current time	CA	
The prompt for buyer was removed but a Buyer version still exists. Will have to be manually added to tree if needed. The ID is DOC_SCA0002668_Buyer.			

[Back to Table of Contents](#)

FIRPTA - Waiver of Settlement Agent Responsibility			
NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
-	None	All	
Removed per Settlement. Replaced with Notice of Settlement Agent Responsibility (DOC_SSCORPD5500 except for in TX which will have it's own version)			

[Back to Table of Contents](#)

Verification of Trust			
NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
-	None	CA and OR	
Removed per Settlement			

[Back to Table of Contents](#)