

**HERITAGE TITLE COMPANY**  
**TITLE EXAMINING CHECKLIST**

**HTC File No.:** \_\_\_\_\_

**Legal Description:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1. **Title Vesting:**  
Title is vested in the name(s) of: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. **Open Mortgage Information:**  
**1st Mortgage (if any)**  
Mortgagor: \_\_\_\_\_  
Mortgagee: \_\_\_\_\_  
Date of Instrument: \_\_\_\_\_ Date of Recording: \_\_\_\_\_  
Recorded Document Number: \_\_\_\_\_

**Assignment of Mortgage (if any)**  
Assigned to: \_\_\_\_\_  
Date of Recording: \_\_\_\_\_ Document Number: \_\_\_\_\_

**2nd Mortgage (if any)**  
Mortgagor: \_\_\_\_\_  
Mortgagee: \_\_\_\_\_  
Date of Instrument: \_\_\_\_\_ Date of Recording: \_\_\_\_\_  
Recorded Document Number: \_\_\_\_\_

**Assignment of Mortgage (if any)**  
Assigned to: \_\_\_\_\_  
Date of Recording: \_\_\_\_\_ Document Number: \_\_\_\_\_

**3rd Mortgage (if any)**  
Mortgagor: \_\_\_\_\_  
Mortgagee: \_\_\_\_\_  
Date of Instrument: \_\_\_\_\_ Date of Recording: \_\_\_\_\_  
Recorded Document Number: \_\_\_\_\_

**Assignment of Mortgage (if any)**  
Assigned to: \_\_\_\_\_  
Date of Recording: \_\_\_\_\_ Document Number: \_\_\_\_\_

Permanent Injunctions:

Case Number: \_\_\_\_\_  
Date of Instrument: \_\_\_\_\_  
Date of Recording: \_\_\_\_\_  
Recorded Document Number: \_\_\_\_\_

Building Violations:

Case Number: \_\_\_\_\_  
Date of Instrument: \_\_\_\_\_  
Date of Recording: \_\_\_\_\_  
Recorded Document Number: \_\_\_\_\_

Foreclosures:

Case Number: \_\_\_\_\_  
Date of Instrument: \_\_\_\_\_  
Date of Recording: \_\_\_\_\_  
Recorded Document Number: \_\_\_\_\_

Other:

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3. **Tax/PIN Information:**  
Property Identification Number (PIN): \_\_\_\_\_

Tax Information:

Year: \_\_\_\_\_ Installment: \_\_\_\_\_ Amount: \_\_\_\_\_

Year: \_\_\_\_\_ Installment: \_\_\_\_\_ Amount: \_\_\_\_\_

2<sup>nd</sup> PIN Number (if any): \_\_\_\_\_

Tax Information:

Year: \_\_\_\_\_ Installment: \_\_\_\_\_ Amount: \_\_\_\_\_

Year: \_\_\_\_\_ Installment: \_\_\_\_\_ Amount: \_\_\_\_\_

Are there any outstanding special assessments?

If yes, payable to \_\_\_\_\_

Year(s): \_\_\_\_\_ Amount: \$ \_\_\_\_\_

4. **Building Lines and Easements:**

Are there building lines or easements of record?

If Yes, the building line is located \_\_\_\_\_ feet from the \_\_\_\_\_ lot line as shown on the plat of subdivision recorded as Document Number \_\_\_\_\_ or as contained in (Deed or Declaration) recorded as Document Number \_\_\_\_\_.

The easements are located \_\_\_\_\_ feet from the \_\_\_\_\_ lot line and \_\_\_\_\_ feet from the \_\_\_\_\_ lot line.

5. **Covenants, Conditions and Restrictions:**

Are there covenants, conditions and restrictions (CCR's) of record?

If Yes:

Type of Document: \_\_\_\_\_

Date of Document: \_\_\_\_\_

Recorded Document Number: \_\_\_\_\_

List specifics of the CCR:

\_\_\_\_\_

6. **Judgments and Liens:**

Are there any possible Judgments or Liens against the Seller?

If Yes, list Name that Judgment/Lien is against:

\_\_\_\_\_

Are there any possible Judgments or Liens against the Buyer?

If Yes, list Name that Judgment/Lien is against:

\_\_\_\_\_

7. **Municipal Stamps and Inspections:**

Is the Property located within a municipality that requires Transfer Stamps or an Inspection?

If Yes, list Name of Municipality: \_\_\_\_\_

Party responsible for Transfer Stamps? \_\_\_\_\_ \$ \_\_\_\_\_ per thousand

- 8. Condominiums:**  
 Is this Property a Condominium Unit?  
 If Yes, the Recorded Condo Declaration Number is: \_\_\_\_\_ Is  
 the Condominium subject to an assessment for which the Condominium Association will complete a  
 Paid Assessment Letter and a Right of First Refusal?
- 9. Planned Unit Development:**  
 Is this property part of a Planned Unit Development?  
 If there is a Recorded Declaration, the Document Number is \_\_\_\_\_  
 Is said property part of an Association that requires an Assessment Letter?
- 10. Drainage Districts and Special Service Areas:**  
 Is this property in Lake County? Yes or No  
 If Yes, is the property serviced by the North Shore Sanitary District?  
 Is this property part of any other Sanitary and/or Drainage District?  
 If Yes, the Name of the Sanitary and or Drainage District is: \_\_\_\_\_  
 Are there outstanding fees due for a Special Service Area?  
 What is the name or number of the Special Service Area? \_\_\_\_\_  
 Amount Due: \$ \_\_\_\_\_
- 11. Marital Status:**  
 Is the Seller married? Yes or No  
 Is the Buyer married? Yes or No  
 Are there outstanding Homestead Rights for either party?
- 12. Leases:**  
 Does the Seller live at the property?  
 If no, are there any leases either recorded or unrecorded?
- 13. Probate Exceptions:**  
 Is there a Title Holder of Record who may be deceased?  
 If Yes, list name of surviving spouse or heir: \_\_\_\_\_  
 Is there a Probate case pending, with regard to the deceased individual?  
 Indicate Probate Case Number:
- 14. Effective Date:**  
 What is the effective date of this commitment? \_\_\_\_\_

I have examined the search packet on File Number \_\_\_\_\_ and hereby authorize  
**Heritage Title Company**, Authorized Servicing Agent, to type a Title Commitment using the information set  
 forth above.

\_\_\_\_\_  
 Attorney Agent-Authorized Supported Agent

\_\_\_\_\_  
 Date

**UPON COMPLETION OF THIS CHECKLIST,  
 PLEASE FAX or EMAIL TO  
 Examiner@htctitleservices.com/(773)545-1412**