



# 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](http://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:** \_\_\_\_\_

**Please return this completed form to:  
TITLE@FIRSTEXCEL.NET**



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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 with 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)**

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**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 this completed form to:  
TITLE@FIRSTEXCEL.NET**