

# Closing document preparation

Automates the preparation of closing documents by gathering property data, generating required forms, and validating compliance requirements. Reduces document preparation time from hours to minutes while ensuring accuracy and regulatory compliance.

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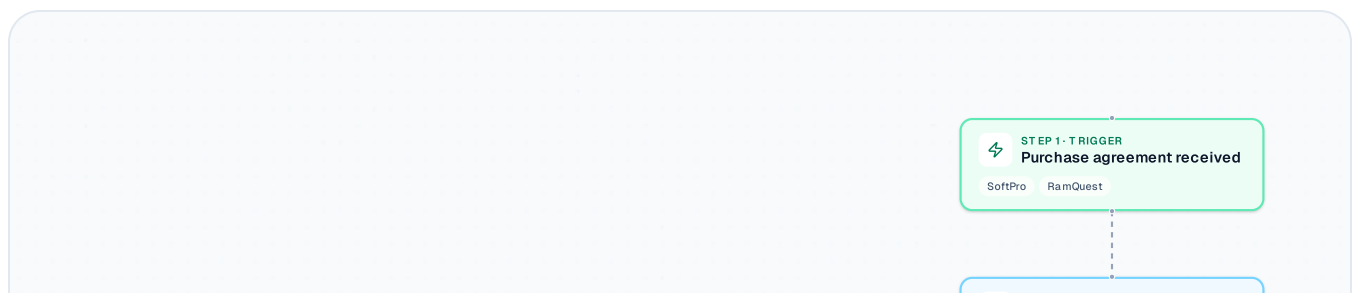


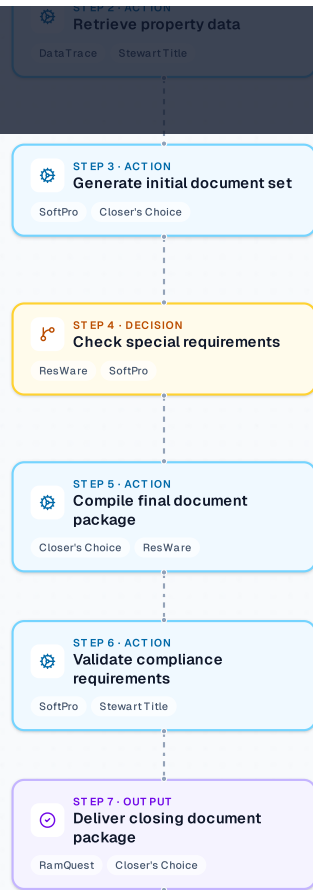
## WORKFLOW TRIGGER

Purchase agreement uploaded and closing date scheduled in system

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Purchase agreement received

Purchase agreement is uploaded to the system and closing date is scheduled. Workflow automatically extracts property details and party information to begin document preparation.

2

 ACTION

### Retrieve property data

System pulls comprehensive property information including legal description, tax records, and ownership history. Data is validated against multiple sources for accuracy.

DataTrace

Stewart Title

3

 ACTION

### Generate initial document set

Core closing documents are automatically generated including deed, settlement statement, and title policy. Documents are populated with verified property and party data.

SoftPro

Closer's Choice

4

 DECISION

### Check special requirements

System evaluates if transaction requires additional documents such as affidavits, power of attorney forms, or state-specific disclosures. Branches workflow based on requirements identified.

ResWare

SoftPro

5

 ACTION

### Compile final document package

All required documents are assembled into complete closing package with proper sequencing. Package includes signature pages and notarization requirements clearly marked.

Closer's Choice

ResWare

6

 ACTION

## Validate compliance requirements

Automated compliance check verifies all documents meet federal, state, and local requirements. System flags any missing elements or potential issues for review.

SoftPro

Stewart Title

7

 OUTPUT

## Deliver closing document package

Complete, compliant closing document package is delivered to designated parties with digital signatures enabled. Package includes execution instructions and timeline.

RamQuest

Closer's Choice



## Outputs

- Complete closing document package



### Key Metrics

- Document preparation time
- Compliance error rate
- Package completion accuracy



### Tools & Integrations

- SoftPro
- RamQuest
- ResWare
- Closer's Choice
- DataTrace
- Stewart Title



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