



# EQUITY TITLE CHERRY CREEK

3773 Cherry Creek N Drive, Suite 100 Denver, CO

**303.375.4960 -PH**  
**303.373.4969 - FAX**

## Personal Profile

This profile should be a comprehensive summary of each partner's preferred operating procedures. Once complete, the ETCC staff should have all the information necessary to perform the order fulfillment process in accordance with the owner's preference.

## General Information

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Processors / Assistant \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Office \_\_\_\_\_

Name and number of personnel who handles your business when you are not available?

\_\_\_\_\_

Special preferences or needs:

\_\_\_\_\_

\_\_\_\_\_

## **In Contract Profile**

Primary person to contact \_\_\_\_\_

Preferred delivery method of commitment?

Preferred delivery method of Settlement Statements?

Preferred channel of communication during in contract period? Phone/e-mail

Special preferences or needs: \_\_\_\_\_

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## **Closing Profile**

- Preferred Closing Location?
  
- Split Closing Preferred? Mail out to Seller/Buyer? Depends on the request
  
- Deduct EM from Commission check when applicable?
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- Cashiers Check on all transactions or upon request?
  
- Copy package or Disc?
  
- Review documents before closing (which source of delivery?)
  
- Phone calls or emails to stay updated on progress/status (Source of Communication)?
  
- Is it alright to contact your customer directly to request info?

Special preferences or needs:

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**Relationship Transition Agenda.**

**Name(s) of prior Title Company** \_\_\_\_\_

**Names and contact numbers of key personnel**

_____	_____
_____	_____
_____	_____

**Summary of service items utilized**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Initial Transition Concerns**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_