



**Anderson Law &  
Escrow, PLLC**

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**New Closing Information Checklist**

Below is a checklist of essential information, needed for a successful transaction:

**Client Information**

<u>Purchaser</u>	<u>Seller</u>	
<input type="checkbox"/>	<input type="checkbox"/>	Names of all parties
<input type="checkbox"/>	<input type="checkbox"/>	Names of spouses (if applicable)
<input type="checkbox"/>	<input type="checkbox"/>	Corporation, the name of the President, shareholders and directors
<input type="checkbox"/>	<input type="checkbox"/>	LLC, the name of the Manager, Member or Managing Member
<input type="checkbox"/>	<input type="checkbox"/>	Mailing address, phone number, email address, and/or website
<input type="checkbox"/>	<input type="checkbox"/>	Washington State UBI number
<input type="checkbox"/>	<input type="checkbox"/>	Nationality if not a US Citizen
<input type="checkbox"/>	<input type="checkbox"/>	Exact name of all signers
<input type="checkbox"/>	<input type="checkbox"/>	Name and contact information of the representing broker

**Business Information**

- Current name of the business (Seller)
- Future name of the business (Purchaser)
- Business address and website
- Signed equipment list

**Financial Information**

- Name of Bank or other financial institution
- Address, phone number, email, fax and contact person
- Approximate loan amount
- Payoff figures of underlying loan(s) for Seller being paid out of escrow and loan numbers

**Closing Document Information (if applicable)**

- Closing date (approximate)
- Allocation of values: equipment, leaseholds, goodwill, intangibles, & other
- Copy of Lease Assignment or new Lease
- Security deposit
- Security Agreement
- Promissory Note - terms
- Non-Compete Agreement - terms
- Rent amount and if it is to be pro-rated through escrow
- Insurance Binder (Purchaser)
- List of any other pro-rations to be either handled or paid through closing
- Liquor license