

Closing Insurance Checklist

Boca Raton home insurance closing checklist



Scan to refer a buyer

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- ☐ Buyer referred for a home insurance quote in week one of escrow
 - ☐ Seller's current declarations page requested
 - ☐ Roof age confirmed from permit or roofer records
 - ☐ Roof inspection report ordered for an older roof
 - ☐ 4-point inspection booked with the home inspection, if a company wants one
 - ☐ Wind mitigation inspection booked at the same appointment
 - ☐ Condo: master policy declarations requested from the association
 - ☐ Condo: unit owner coverage (HO-6) quoted for the buyer
 - ☐ Citizens on the seller's side: buyer quoted in the buyer's own name
 - ☐ Flood zone checked on FEMA's Flood Map Service Center
 - ☐ Lender's written insurance conditions shared with the agent
 - ☐ Lender shown as mortgagee on the buyer's policy
 - ☐ Policy effective date matches the closing date
 - ☐ Proof of insurance delivered to the lender and the title agent
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