



Grant No. _____ Grant Applicant: _____

Brief Description of Property: _____

Pre-Closing Instructions for Fee and Easement Acquisitions – Documents to Be Submitted to CWMTF

- ____ 1. Option to Purchase/Sales Contract and Copy of Recorded Deed or Other Legal Document showing Current Fee Simple Ownership (Option or Sales Contract must be signed and executed.)
- ____ 2. Appraisal (Two appraisals are needed if value is greater than \$500,000. If an appraisal is over \$500,000, CWMTF will forward to the State Property Office for review. All appraisals should be forwarded to CWMTF as soon as possible, but no later than 60 days prior to the anticipated Closing date and should reflect a fair market value. Appraisals for conservation easements must reflect a “before and after” approach. Ample time should be allowed for review prior to Closing. All appraisals may be subject to review by the SPO.)
- ____ 3. Environmental Report (Phase 1 report unless otherwise instructed by CWMTF and must be received 60 days prior to the anticipated Closing date)
- ____ 4. Proposed General Warranty Deed to Grantee (Description must either be a metes and bounds or refer to a recorded map book and page.)
- ____ 5. Proposed Conservation Easement (Description must either be metes and bounds or refer to a recorded Map Book and Page. If the State of North Carolina is the Grantee; the Grantor must be an eligible applicant as set out in NCGS 113A-251 et seq.)
- ____ 6. Proposed Assignment of Conservation Easement (Same as item no. 5)
- ____ 7. Zoning and Regulatory Compliance
- ____ 8. Title Insurance Commitment (Copies of all listed title exceptions and requirements must accompany the document. This includes any and all copies of listed maps and surveys.)
- ____ 9. Survey (In recordable form. Three copies. Two full-sized, one 8½” by 11”. Survey must be made within 90 days prior to Closing unless otherwise approved by CWMTF and must be received 60 days prior to the anticipated Closing date.)
- ____ 10. Taxes and Special Assessments. (Evidence that the ad valorem taxes have been paid through the year prior to Closing. If taxes are due at time of Closing they must be shown on Closing statement and paid as part of Closing.)
- ____ 11. Settlement Statement (Proposed settlement costs.)

____ 12. Closing Attorney (Name, address, and telephone number of attorney along with the place, date, and time of Closing, attorney's TIN and trust account information.)

____ 13. Seller's or Grant Recipient's Affidavit as to Environmental Condition of Property

____ 14. Baseline Report

(Please note: Item numbers 2, 3, and 9 must be received 60 days prior to the date of your anticipated Closing date if funding is expected at Closing. Otherwise, all documentation should be submitted 30-45 days prior to Closing unless otherwise stated in Section III of your grant agreement. Please know that from the date that all documents are received by the Fund, that a *reasonable* amount of time should be allowed for CWMTF to make its review and process your request for funds. Once your request has been processed, please allow 5 to 15 business days to receive your check. CWMTF is not responsible for Closing dates that have been predetermined by you and the Seller, unless special permission is granted by the Executive Director 90 days prior to the anticipated Closing date. Extenuating circumstances must be provided to the Deputy Director in order to consider your request. Refer to your grant agreement for explicit instructions pertaining to the above named items. Please contact CWMTF to review this checklist; some of the listed items may not apply to every acquisition. Your request for funds will be processed only upon receipt of all applicable items.