Turnkey TC Solutions

RELIABLE. EFFICIENT. TURNKEY.

FREE INVESTOR KIT

The Contract for Deed Attorney Packet

Send your attorney a complete deal the first time - and keep every closing on track from agreed terms to a finished, organized file.

01 **Attorney-Ready Deal Terms Sheet**
Every term and detail your attorney needs, on one page.

02 **Draft Verification Checklist**
Catch wrong names, numbers and dates before anyone signs.

03 **12-Stage Closing Tracker**
Who owns each step, and when it was done.

04 **Final Closing File Structure**
A folder system you'll thank yourself for in five years.

THE INVESTOR
Makes the business decisions.

THE ATTORNEY
Prepares the legal documents and advises on the law.

THE TC
Keeps information, signatures and deadlines moving.

This kit is an organizational tool, not a legal form or legal advice. Your attorney decides which documents your deal needs and how they are drafted, executed and recorded under your state's law.

PART 01

Attorney-Ready Deal Terms Sheet

Complete every line before you request documents. Type into this form, save it, and send it as one package.

A PARTIES & PROPERTY

PROPERTY ADDRESS

SELLER - EXACT LEGAL NAME OR ENTITY

TENANT BUYER(S) - EXACT LEGAL NAMES

LEGAL DESCRIPTION ATTACHED? ☐ Yes ☐ No

CURRENT VESTING / HOW TITLE IS HELD

B FINANCIAL TERMS

PURCHASE PRICE ($)

DOWN PAYMENT ($)

AMOUNT FINANCED ($)

INTEREST RATE (%)

AMORTIZATION (MONTHS)

MONTHLY P&I ($)

TAXES / MONTH ($)

INSURANCE / MONTH ($)

TOTAL MONTHLY PAYMENT ($)

BALLOON AMOUNT, IF ANY ($)

BALLOON DUE DATE

TAXES & INSURANCE PAID BY

☐ Escrow with servicer ☐ Buyer direct

C DATES & SERVICING

POSSESSION DATE

FIRST PAYMENT DATE

MONTHLY DUE DAY

LOAN SERVICER (COMPANY & CONTACT)

LATE-PAYMENT TERMS

To be set by counsel

OTHER NEGOTIATED TERMS / ANYTHING UNUSUAL COUNSEL SHOULD KNOW

D CONTACTS

ROLE	NAME	PHONE	EMAIL
Seller			
Tenant buyer			
Attorney			
Title company			
Servicer			
Insurance agent			

Supply the deal terms. Your attorney decides how they belong in the legal documents.

PART 02

Draft Verification Checklist

Not a legal review - just confirm the drafts match the terms you sent. Fifteen minutes here can save a costly mistake.

PROPERTY

DRAFT #

NAMES

- [ ] Seller name spelled exactly right
- [ ] Seller LLC / entity name exact (incl. "LLC", "Inc.")
- [ ] Every tenant buyer's full legal name correct

PROPERTY

- [ ] Street address, city, state and ZIP correct
- [ ] Legal description appears to match what you sent
- [ ] County is correct

NUMBERS

- [ ] Purchase price
- [ ] Down payment & amount financed
- [ ] Interest rate & amortization
- [ ] Monthly payment (P&I and total)
- [ ] Balloon amount, if any

DATES

- [ ] Execution date
- [ ] First payment date
- [ ] Monthly due date
- [ ] Possession date
- [ ] Maturity / balloon date, if any

SERVICING

- [ ] Servicer named matches the plan
- [ ] Taxes & insurance handling matches terms
- [ ] Where and how the buyer pays is clear
- [ ] Unsure if language is intentional? Ask counsel

DO

Send corrections back to the attorney - short, factual, specific. Ask counsel when you can't tell a mistake from intentional language.

DON'T

Edit the attorney's document yourself, rewrite legal clauses, or forward a draft for signature before it's verified.

CORRECTION REQUEST - EDIT, COPY & SEND TO COUNSEL

Subject: [PROPERTY ADDRESS] - Contract for Deed - Draft [#] corrections

Hi [ATTORNEY NAME], we reviewed Draft [#] against the agreed terms. Please update:
- Buyer name should be [CORRECT NAME], not [AS DRAFTED].
- Purchase price should be $[AMOUNT].
- First payment is due [DATE].

Everything else matches. Please send the revised version marked FINAL when ready. Thank you!

PART 03

12-Stage Closing Tracker

Use the same checklist on every deal. Stop treating each closing like a brand-new project.

PROPERTY

TARGET CLOSE

#	STAGE	OWNER	DATE DONE	DONE
01	**Terms finalized** Every field on the Deal Terms Sheet is complete.	Investor		☐
02	**Supporting info gathered** Legal description, vesting, title docs, entity info, contacts.	TC		☐
03	**Attorney package sent** One complete, organized closing request.	TC		☐
04	**Drafts received** Saved and labeled by draft number.	Attorney		☐
05	**Drafts verified against terms** Draft Verification Checklist completed.	Investor / TC		☐
06	**Corrections made** Sent to counsel; revised draft returned.	TC > Attorney		☐
07	**Final documents approved** Labeled FINAL; old drafts marked DO NOT SIGN.	Attorney		☐
08	**Signatures completed** Method, notary, witnesses and originals confirmed.	TC		☐
09	**Funds confirmed** Down payment handled per transaction instructions.	Investor / TC		☐
10	**Servicing activated** Account set up; buyer knows where to pay.	TC / Servicer		☐
11	**Recording confirmed** Recorded copy received and saved.	Per counsel		☐
12	**Final file stored** Complete file organized (see Part 04).	TC		☐

ASK COUNSEL ABOUT RECORDING

1. What needs to be recorded?
2. Who is responsible for recording it?
3. How will we get confirmation?

VERSION CONTROL RULE

Name it: [Address] - Contract for Deed - FINAL

Label every old draft DRAFT - DO NOT SIGN. Only attorney-approved finals reach the signing table.

Signing method, notary, witnesses and recording rules vary by state - confirm with counsel.

PART 04

Final Closing File Structure

Five years from now, you won't be digging through old email threads to remember what everyone agreed to.

01 Purchase & Property Documents
Acquisition closing docs, title, legal description.

02 Tenant Buyer Information
Application, ID, contact details.

03 Attorney Correspondence
Closing request, emails, correction requests.

04 Draft Documents
Every draft, labeled DRAFT - DO NOT SIGN.

05 Final Signed Documents
Executed contract and all signed closing docs.

06 Servicing
Servicer setup, payment instructions, down payment proof.

07 Insurance
Policy, declarations page, additional insured.

08 Recording
Recorded copies and recording confirmation.

Must-keep originals: executed contract, payment terms, servicing details, proof of down payment, attorney-prepared documents, recorded documents and key correspondence - all in one place.

DOING TWO OR MORE OF THESE A MONTH?

Hand this whole kit to us.

You focus on finding and structuring deals. Turnkey TC Solutions handles the administrative side, from accepted tenant buyer all the way through closing.

- Gather deal info & build the attorney package
- Track drafts, documents & signatures
- Organize your complete closing file
- Communicate with attorneys & closing pros
- Confirm servicing & recording
- Keep everyone moving to the finish line

SCHEDULE A CALL WITH CINDY

cindy@turnkeytc.io
217-414-1835 · turnkeytc.io

This kit is an organizational tool, not a legal form or legal advice. Turnkey TC Solutions does not prepare legal documents or practice law. Consult a licensed attorney in the state where the property is located.