



Terms of Engagement

This Terms of Engagement document establishes the relationship between you and Cline Law Group, PLLC for the sale of your property. The Terms of Engagement document explains the scope of our representation; the obligations we have to each other for disclosure and confidentiality; and administrative information. We will consult with you as necessary to ensure the timely and effective completion of our work.

It is common that we undertake to represent both buyers and sellers in the same transactions, North Carolina law allows us to do this work if the parties do not object. Of course, if a dispute later arises between you and the buyers, we will not undertake to represent either side. Please let us know immediately if you object.

If we prepare your Deed Package and any other documents necessary to legally transfer your property, our representation is limited to document preparation and execution and will terminate automatically upon the completion of the real estate transaction. If you are represented by another attorney, please let us know, in which case our interactions will be limited as we will prefer to work through your agent or attorney.

Seller Obligations

You agree to provide us with all factual information and materials necessary to perform our services. We cannot be responsible for undesired consequences caused by your failure to disclose information to us.

AS SOON AS POSSIBLE RETURN THE INCLUDED INFORMATION SHEET AND PAYOFF AUTHORIZATION

Documents can be returned in the following ways:

- **Dropped by our office:** 6329 Oleander Drive, Wilmington NC 28403 (we lease space from Alpha Mortgage)
- **Mailed to our office:** 6329 Oleander Drive, Wilmington NC 28403 (we lease space from Alpha Mortgage)
- **Emailed:** info@clinelawgroupnc.com (Please include your name and property address in the subject line, call our office to provide sensitive information at (910) 661-2012)
- **Faxed:** (910) 338-0557
- **Secure Dropbox via our Website:** <https://www.clinelawgroupnc.com/closing-information-upload>

The Professional Ethics rules require us to keep all information that you disclose to us confidential and not disclose it to persons outside Cline Law Group, PLLC without your permission. The lawyer who is primarily responsible for your issue may need to disclose information about your affairs to other lawyers and paralegals within Cline Law Group, PLLC to best meet your needs.

If other professionals not in Cline Law Group, PLLC are working with us, you agree that we may disclose information to them as necessary. We will use our judgment in making disclosures to these other professionals; unless you instruct us otherwise, you agree that we may disclose

Administrative Information

Appointments We see our clients by appointment. Our normal office hours are 8:00 a.m. to 5:00 p.m., Monday through Friday, and appointments are available at other times if necessary. Please call the office if you will be late or if you need to cancel the appointment. If you must see your attorney on an urgent matter, please call ahead and we will try to accommodate you. When you call, give the receptionist a brief description of the problem.

If you have a legal question, please call your attorney. Sometimes our support staff may be able to assist you on matters such as payoff information, deed status information, and gathering information that has been requested of you. But please be sure that you only request legal advice from our attorneys.

By executing this document, the client and this office agree that any controversy or claim arising out of or relating to this contract, including but not limited to any dispute relating to services provided, attorney fees or expenses, shall be settled by arbitration administered in accordance with the North Carolina Revised Uniform Arbitration Act and judgment on the arbitration award may be entered in any court that has jurisdiction.

CLINE LAW GROUP PLLC PRIVACY POLICY NOTICE

Attorneys, like other professionals who advise on personal financial matters, are now required by federal law to inform their clients of their policies regarding privacy of client information. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by this new law. Therefore, we have always protected our client's right to privacy.

In the course of providing our clients with legal advice, we sometimes receive significant personal financial information from our clients. If you are a client of Cline Law Group, PLLC, you should know that all information that we receive from you is held in confidence, and is not released to people outside the firm, except as agreed to by you, or as required under applicable law.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Signature

Signature

Date

Date

CLINE LAW GROUP PLLC

clinelawgroupnc.com | 6329 Oleander Drive, Wilmington, NC 28403

Seller: _____ SSN: _____

Seller: _____ SSN: _____

Property Address: _____

SELLER INFORMATION

Best Phone Number: _____

Email: _____

Seller's Status: ____ Married ____ Single ____ Divorced ____ Widowed ____ Entity

If Entity, State of Incorporation: _____

Forwarding Address after closing: _____

Does Seller live in this property as their primary residence? ____ Yes ____ No

Delivery of Seller Proceeds: _____ Pick Up _____ USPS _____ FedEx (\$50 Fee)

Will our firm prepare the Deed Package: _____ Yes _____ No

If yes, will Seller(s) be available to sign locally? _____ Yes _____ No

If we will not be preparing the Deed Package, please provide the information below

Attorney Preparing Deed: _____ Phone: _____

PAYOFFS OF EXISTING MORTGAGES ON PROPERTY:

Lender: _____ Acct Number: _____

_____ Mortgage _____ Equity Line of Credit

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_____ Mortgage _____ Equity Line of Credit

REAL ESTATE AGENT COMMISSIONS:

_____ % Total Split _____ % to Seller's Agent (LA) _____ % to Buyer's Agent (SA)

HOME OWNER'S ASSOCIATION _____ Yes _____ No

Name: _____ Management Company: _____

HOA Phone: _____

HOA Email: _____

PAYOFF REQUEST – PLEASE RUSH

Lender: _____

Date: _____

From: Jason Cline, Cline Law Group PLLC

Re: Borrowers: _____

Loan Number: _____

SSN/Tax ID: _____

Property Address: _____

We have been retained to handle the closing for the **sale** of the above referenced property. In connection with this transaction, please **fax a payoff statement** to our office good through _____. Please be sure to include per diem, if applicable; please include an address to send funds or wiring instructions (preferred).

Fax Number for Payoff: (910) 338-0557

Please reach out to us if there are any questions.

Jason Cline
Cline Law Group PLLC

BORROWER AUTHORIZATION

(person to sign must be on the loan)

Signature

Date

Name: _____