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**NEW CLIENT QUESTIONNAIRE FOR USA TITLE & ESCROW,  
INC.**

USA Account Executive: \_Chris Treece\_\_\_\_\_

Company Name: \_\_\_\_\_

Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Main Phone: \_\_\_\_\_ Main Fax: \_\_\_\_\_

Contact Direct Phone: \_\_\_\_\_ Contact Direct Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Preferred Method of Contact: \_\_\_\_\_

Alternate contact at client office: \_\_\_\_\_

How many loans do they average a month (CLOSED)? \_\_\_\_\_

What percentage are purchases? \_\_\_\_\_ refi's? \_\_\_\_\_

What percentage of your business is: Prime? \_\_\_\_\_ Sub-Prime \_\_\_\_\_

Who Originates Title Orders: Manager? \_\_\_\_\_ Loan Officer? \_\_\_\_\_  
Processor? \_\_\_\_\_

Major states/counties of their loans? \_\_\_\_\_

Special needs when you place order \_\_\_\_\_

Special needs with the Commitment\_\_\_\_\_

Special needs at closing\_\_\_\_\_

Special needs at post closing\_\_\_\_\_

Special needs for funding\_\_\_\_\_

Do we have permission to call lender or borrower for needed info  YES  NO

What do love about a particular title company? \_\_\_\_\_

What do you hate about title companies? \_\_\_\_\_

AdditionalComments:\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**THANK YOU FOR YOUR TIME.**



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