

Client Document Checklist and Upload Guide

Secure Document Collection

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DRAFT PROFESSIONAL RESOURCE - REVIEW BY PENNSYLVANIA COUNSEL BEFORE PUBLICATION OR USE

Purpose and Use

Helps attorneys and clients identify the property documents that may be needed. Upload only through the secure method provided for the matter.

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Matter Identification

CLIENT / MATTER

ATTORNEY

PROPERTY ADDRESS

SECURE UPLOAD FOLDER OR REFERENCE

Ownership and Financing

- | | |
|--|---|
| ☐ Current deed | ☐ Most recent mortgage statement |
| ☐ HELOC / second mortgage statement | ☐ Property tax bill |
| ☐ Homeowners insurance declarations | ☐ HOA / condominium documents |
| ☐ Title report / title insurance policy | ☐ Refinance or assumption correspondence |

Property and Condition

- | | |
|--|---|
| ☐ Recent appraisal | ☐ Prior CMA or valuation |
| ☐ Inspection report | ☐ Repair estimates |
| ☐ Paid invoices / canceled checks | ☐ Permits |
| ☐ Before-and-after photographs | ☐ Survey |
| ☐ Floor plan | ☐ Existing listing documents |

Legal and Case Materials

- | | |
|--|--|
| ☐ Relevant court order | ☐ Settlement agreement / proposal |
| ☐ Exclusive-possession order | ☐ PFA or access restrictions |
| ☐ Discovery responses concerning property | ☐ Attorney instructions |
| ☐ Other authorized case document | |

Upload Safety and Completion

Do not upload Social Security numbers, account passwords, unredacted tax returns, children's confidential records, or complete account numbers unless counsel specifically directs a secure submission.

- | | |
|--|---|
| ☐ Files are clearly named | ☐ Pages are upright and readable |
| ☐ Documents are complete | ☐ Sensitive data was minimized or redacted |
| ☐ No passwords are included | ☐ Upload completed through secure link |
| ☐ Attorney was notified | ☐ I kept a copy |

DOCUMENTS NOT AVAILABLE OR STILL NEEDED

UPLOAD NOTES

COMPLETED BY**DATE**