



Legacy Wise Title Research Coordination

Before You Request a Property Search

Customers and coordinators preparing a property-record research request and reviewing delivery scope.

Search organization only. This pack is not a title report, title insurance, legal opinion, lien determination or proof of clear ownership. Qualified professionals interpret records.

Four checks before you proceed

Identify the property and scope

Record the property address, county, parcel reference if known and the customer's purpose. State the requested search period and document categories, then have the search provider confirm coverage and exclusions. Distinguish a proposed scope from a confirmed assignment. Do not assume an online index contains every relevant record or that one county's method applies elsewhere.

Document source and limitations

Ask the provider to record the sources searched, search dates, naming variations and access limitations. Keep original documents or source references with the research file. Separate the searcher's factual findings from interpretation requiring an attorney or other qualified professional. A missing result is not treated here as proof that an instrument or interest does not exist.

Review completeness against the order

Compare the delivered file with the confirmed scope. Check property identifiers, date range, requested document categories and readable attachments. Log missing pages, mismatched references or unexplained gaps as questions to the provider. Do not convert an administrative completeness check into a legal opinion about priority or ownership.

Handoff the factual package

Create an index of delivered records, provider notes and unresolved questions. Name the recipient who will interpret or use the information. Record delivery date and any requested corrections. Preserve revisions clearly so an outdated package is not mistaken for the current file. Refer legal conclusions and insured coverage questions to the appropriate professional.

Your next step

Open question	Who should answer	Next date

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