

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Quarterly Post-Closing Review - [Property Address/Project Name]

Dear [Client Name],

This letter serves to confirm the terms of our engagement for the quarterly post-closing management and oversight of the real estate transaction referenced above for the period of [Start Date] to [End Date].

Scope of Services

During this quarter, our services will include:

- Monitoring the completion of all post-closing escrow requirements.
- Reviewing final title policies and recorded instruments for accuracy.
- Verifying the status of property tax assessments and insurance renewals.
- Tracking any remaining holdback releases or earn-out provisions.
- Providing a summary report of any outstanding compliance or administrative items.

Fees and Expenses

Our professional fee for this quarterly engagement is set at \$[Amount]. Any additional out-of-pocket expenses, such as filing fees or third-party reports, will be billed at cost. Payment is due within [Number] days of the invoice date.

Client Responsibilities

To ensure an effective review, you agree to provide us with timely access to all relevant financial statements, correspondence with lenders, and notices from municipal authorities received during this quarter.

Term

This engagement covers the specific quarter mentioned above. It will automatically renew for the following quarter unless terminated in writing by either party at least [Number] days prior to the new period.

Please acknowledge your acceptance of these terms by signing below and returning a copy to our office.

Sincerely,

[Your Name/Company Name]
[Your Title]

Accepted and Agreed:

Signature: _____

Date: _____