Cost-Savings Checklist for Title Agents

Practical ways to protect and increase your bottom line | Capital Bank

Banking & Fees

- ■ Review escrow account and wire fees regularly
- ■ Confirm same-day wire cutoff times and costs
- ■ Review monthly bank statements for hidden or avoidable fees

Technology & Software

- ■ Eliminate unused or underutilized software licenses
- ■ Ensure staff are trained on existing TPS features
- ■ Enable automation before purchasing new technology

Vendors & Services

- ■ Consolidate vendors where possible
- ■ Renegotiate contracts annually
- ■ Verify vendor compliance with ALTA Best Practices

Workflow Efficiency

- ■ Standardize templates and master orders
- ■ Reduce rework with checklist-driven processes
- ■ Track cycle times and post-closing error corrections

Staffing & Cross-Training

- ■ Cross-train core responsibilities across staff
- ■ Document processes to avoid knowledge silos
- ■ Limit overtime through better workload balance

Notes / Action Items