



Loan #	Rate		Loan Amount			Borrower's Name		
It is in a trust?	YES	NO	POA	YES	NO	Escrow Waiver	YES	NO
RON Closing?	YES	NO	Is borrower a Foreign National?	YES	NO	CEMA loan?	YES	NO

REQUIRED DOCUMENTATION (The following documentation should be uploaded to the file as soon as it is available)

The most accurate and current Closing Estimate / Title CD / HUD	MI quote for approved loan amount	Loan status must be Valid/ Approved
Valid Rate Lock through next 4 days for Purchase and 7 days for Refinance	Any applicable invoice / receipt for costs associated with loan	Payoff demands and/or statements for any account being paid off at time of closing

Final Vesting *List all Individuals/Entity that will be on title Title Only *Individual/Entity that will be on title only

Full Name(s):
LLC/Trust name:
Email(s):
Requested Closing Date:

IMPORTANT CONTACT INFORMATION

Settlement Agent	Closing Agent/Attorney <small>*This contact will be used to balance and send closing packages</small>
Title Company Name	Title Company Name
Email address	Email for closing instructions
Address	Address
Phone	Phone
Contact Name	Contact Name
License #	License #

Agent Representing Buyer *Applicable only to purchase transactions

Company Name	
Address	
Realtor Name	
Realtor License ID	Company License ID
Email	Phone number

Agent Representing Seller *Applicable only to purchase transactions

Company Name	
Address	
Realtor Name	
Realtor License ID	Company License ID
Email	Phone number

Seller information *Applicable only to purchase transactions

First and Last/company name
The seller's authorized representative to sign the purchase contract, in case the seller is a company

HOA Contacts * In case the subject property is a Condo unit or PUD

Company name	
Contact name	
Email	Phone number