

CD REQUEST/DOC ORDER REQUEST FORM

COMPLETE AND UPLOAD TO LOAN FILE

Requested Date: _____ Loan Number: _____
 Lock Expiration Date: _____ Anticipated Signing Date: _____
 Request CD Prior to CTC

Borrower Information (as they should appear on the docs)

Borrower Name (first, last) : _____ Co-Borrower Name (first, last) : _____
 Non-Borrowing Other : _____ Trust Business Entity : _____
(if applicable)
 Vesting: Yes No If Yes, Provide Name : _____
 POA (approval required prior to docs) : Yes (attach copy of POA) No

Property Information

Street Address : _____
 City : _____
 State : _____ ZIP _____

Property Type

SFRC Condo PUD MF Units: _____

Loan Purpose

Purchase R/T Refi Cash Out Refi
 Owner Occupied Non- Owner 2nd Home

Compensation Plan

Lender Paid Borrower Paid
 Comp Plan % _____ Comp Plan % _____

Loan Information

Term 30 YR 15 YR YR Arm Term
 Loan Program: _____
 Appraised Value \$: _____
 Full Loan Amount \$: _____
 Sales Price \$: _____ Interest Rate _____ %
 First Payment _____ Signing Date _____ %
 Property Type: _____
 Pud or Condo Name: _____
 1st Lien : 2nd Lien :
 Impounds/Escrows Yes No
 Taxes & Insurance
 Taxes Only
 Insurance Only

Fees: Must match most recently disclosed LE and within APR tolerance. Please obtain updated title and Escrow Fees

Broker Fees

1. Origination Charges	POC	Amount
Underwriting Fees		
1st Lien-\$1,795		\$
2nd Lien-\$1,195		\$
Mortgage Broker Fee :		\$
Processing Fee :		\$
2. Lender Credits, Discount Fees or Broker Credits		Amount
Lender Credit to Borrower		\$
Bonafide Discount Fee		\$
3. Required Services		Amount
Appraisal Fee (Invoice Required)		\$
POC <input type="checkbox"/> Yes <input type="checkbox"/> No		
Bkr Reimbursed <input type="checkbox"/> Yes <input type="checkbox"/> No		
Credit Report Fee (Invoice Required)		\$
POC <input type="checkbox"/> Yes <input type="checkbox"/> No		
Bkr Reimbursed <input type="checkbox"/> Yes <input type="checkbox"/> No		
Lender Fees Locked to Rate	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Broker Contact Information

Company Name : _____
 Loan Officer (first name, last name): _____
 Email 1 : _____
 Phone 1 : _____
 Processor - (first name, last name): _____
 Email 2 : _____
 Phone 2 : _____

Escrow Company Information

Company name : _____ License # _____
 Escrow Officer : _____ License # _____
 Phone : _____ Email for DOCS : _____
 Address : _____ City : _____
 State : _____ ZIP : _____

Title Company Information

Company name : _____
 Title Officer : _____ Phone # : _____
 Email : _____
 Address : _____ City : _____
 State : _____ ZIP : _____

Brokers Advantage ONLY

Account Executive : _____
 Account Manager : _____
 Notes : _____

Other Contact Information - PURCHASE TRANSACTIONS ONLY

A. PROPERTY SELLER REALTOR INFORMATION

Real Estate Company Name : _____ License # _____
 Agent Name : _____ Email : _____
 Agent Phone : _____ Agent License # _____
 Address : _____

B. BUYER/BORROWER REALTOR INFORMATION

Real Estate Company Name : _____ License # _____
 Agent Name : _____ Email : _____
 Agent Phone : _____ Agent License # _____
 Address : _____

C. PROPERTY SELLER INFORMATION

Property Seller Name : _____ Address : _____

Loan Officer Signature Line: