

CD & Doc Order Request Form

SECTION A BROKER INFORMATION

BROKER COMPANY NAME

LO NAME

LO EMAIL

LO PHONE

PROCESSOR NAME

PROCESSOR EMAIL

PROCESSOR PHONE

SECTION B LOAN INFORMATION

LOAN NUMBER

INTEREST RATE

RATE LOCK EXP.

CLOSING DATE

1ST PAYMENT

LOAN AMOUNT

PURCHASE PRICE

APPRAISED VALUE

LOAN PROGRAM

LOAN PURPOSE

PREPAYMENT PENALTY

PROPERTY TYPE

PUD OR CONDO NAME

PREVIEW INITIAL CD?

☐ Yes

☐ No

IMPOUNDS*

☐ Yes

☐ No

ESCROW HOLDBACK

☐ Yes

☐ No

POA?

☐ Yes

☐ No

POA NAME

*All HPML loans require impounds. Properties in a Flood Zone are ineligible for impound waivers.

SECTION C BORROWER INFORMATION

BORROWER NAME

CO-BORROWER NAME

BORROWER EMAIL

CO-BORROWER EMAIL

SECTION D VESTING INFORMATION List all individuals who will hold title as their names should appear

NAME

NAME

NAME

NAME

VESTING

ENTITY VESTING (IF APPLICABLE)

NON-PURCHASING SPOUSE (IF APPLICABLE)

CLOSING IN TRUST?

☐ Yes

☐ No

ATTORNEY OPINION LETTER EXISTS?*

*Attorney Opinion Letter — complete if closing in a Trust.



SECTION E FEE DETAILS Invoice required for appraisal, 2nd appraisal, credit report and 3rd party processing fees

Lender Paid Compensation	\$		Appraisal Fee	\$	
Borrower Paid Compensation	\$		POC	☐ Yes ☐ No	
Discount Fee		%	Bkr Reimbursed	☐ Yes ☐ No	
Lender Buyout Fee Exists?	☐ Yes ☐ No		2nd Appraisal Fee	\$	
Seller Credit	\$		POC	☐ Yes ☐ No	
Lender Credit	\$		Bkr Reimbursed	☐ Yes ☐ No	
Other Credit		\$	Credit Report Fee	\$	
Other Fee		\$	POC	☐ Yes ☐ No	
Other Fee		\$	Bkr Reimbursed	☐ Yes ☐ No	
			3rd Party Processing Fee	\$	

SECTION F CLOSING PARTIES

	Real Estate Broker (B)	Real Estate Broker (S)	Title / Settlement	Escrow
Company Name				
Company License #				
Agent Name				
Agent License #				
Email				
Phone				
Email for Closing Docs*				

*Email for Closing Documents — complete only if different from the email above.

NOTES TO CLOSER

SECTION G REQUIRED DOCUMENTS

- | | | |
|--------------------------------|---|---|
| ▲ Locked LE Sent | ▲ Tax Cert or Equivalent | ▲ Est Prelim CD or Settlement Stmt |
| ▲ Hazard Ins dec page or quote | ▲ Title Commitment and ICPL | ▲ Current Payoff Demand (if applicable) |
| ▲ Flood Ins dec page or quote | ▲ 3rd Party Invoices (Processing, Credit, etc.) | ▲ Complete Vesting |

A RE-DRAW FEE OF \$150 WILL BE APPLIED FOR ANY CHANGES AFTER DOCS HAVE BEEN ISSUED.