

CD Request/Doc Order Request Form

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): _____ Borrower Name (First,Last): _____

Non-Borrowing Other: _____

Business Entity Business Entity name: _____

Trust Trust Name: _____

Vesting: _____

POA (Approval required prior to docs): Yes (attach copy of POA) No

Property Information	Loan Information
Street Address: _____	Term: _____
City: _____	Loan Program: _____
State: _____ Zip: _____	Appraised Value \$: _____
Property Type	Full Loan Amount \$: _____
Property Type: _____ Units: _____	Sales Price \$: _____ Interest Rate: _____ %
Loan Purpose	First Payment: _____
Loan Purpose: _____	Pud or Condo Name: _____
Compensation Plan	1st Lien: <input type="checkbox"/> 2nd Lien: <input type="checkbox"/> HELOC <input type="checkbox"/>
<input type="checkbox"/> Lender Paid Comp Plan: _____ %	Impounds/Escrows: <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Borrower Paid Broker Comp: \$ _____	<input type="checkbox"/> Taxes & Insurance
Broker Comp: _____ %	<input type="checkbox"/> Taxes Only
If Broker Comp is disclosed as a flat fee \$____ vs a percentage, fee cannot be changed once it's disclosed.	<input type="checkbox"/> Insurance Only
	<input type="checkbox"/> Flood Insurance Only

Fees: Must match most recent disclosed LE and within APR tolerance. Please Obtain Update title and Escrow Fees

Broker Fees		Amount	
1. Origination Charges			
Underwriting Fees			
1st Lien		\$1,795	
2nd Lien /HELOC		\$1,195	
Processing Fee:		\$	
2. Lender Credits, Discounts 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		
Notes			

Broker Contact Information

Company Name: _____
 Loan Officer Name: _____
 LO Email: _____
 LO Phone #: _____
 Processor Name: _____
 Processor Phone #: _____
 Processor Email: _____

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 Transaction Only

A. Property Seller Realtor Information

Realtor Company Name: _____ License #: _____
 Agent Name: _____ Email: _____
 Agent Phone: _____ License #: _____
 Address: _____

B. Buyer/Borrower Realtor Information

Realtor Company Name: _____ License #: _____
 Agent Name: _____ Email: _____
 Agent Phone: _____ License #: _____
 Address: _____

C. Property Seller Information

Property Seller Name: _____
 Address: _____

Loan Officer Signature Line
