

CD Request/Doc Order Request Form

Requested Date:

Loan Number:

Lock Expiration Date:

Anticipated Signing Date:

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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:

Trust

☐

Trust Name:

Is Borrower a Business Entity

☐

If Yes - Business Entity name:

Personal Guarantor

☐

PG Name (s):

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

Fees: Must match most recent disclosed LE and within APR tolerance. Please obtain updated title and escrow fees

Broker Fees	Broker Contact Information
1. Origination Charges	Amount
Underwriting Fees	
1st Lien	
2nd Lien	
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	
	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