

# 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: \_\_\_\_\_

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: _____	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 updated title and escrow fees.

Broker Fees	Broker Contact Information
<b>1. Origination Charges</b> <span style="float: right;">Amount</span>	Company Name: _____
Underwriting Fees	Loan Officer Name: _____
1st Lien	LO Email: _____
2nd Lien /HELOC	LO Phone #: _____
Processing Fee:	Processor Name: _____
	Processor Phone #: _____
<b>2. Lender Credits, Discounts Fees or Broker Credits</b> <span style="float: right;">Amount</span>	Processor Email: _____
Lender Credit to Borrower	
Bonafide Discount Fee	<b>Escrow Company Information</b>
	Company Name: _____
<b>3. Required Services</b> <span style="float: right;">Amount</span>	License #: _____
Appraisal Fee (Invoice Required)	Escrow Officer: _____
POC: <input type="checkbox"/> Yes <input type="checkbox"/> No	License #: _____
Bkr Reimbursed: <input type="checkbox"/> Yes <input type="checkbox"/> No	Phone #: _____
Credit Report Fee (Invoice Required)	Email for DOCs: _____
POC: <input type="checkbox"/> Yes <input type="checkbox"/> No	Address: _____
Bkr Reimbursed: <input type="checkbox"/> Yes <input type="checkbox"/> No	City: _____
Notes	State: _____ Zip: _____
	<b>Title Company Information</b>
	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