

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
1. Origination Charges Amount	Company Name: _____
Underwriting Fees	Loan Officer Name: _____
1st Lien	LO Email: _____
2nd Lien /HELOC	LO Phone #: _____
Processing Fee:	Processor Name: _____
	Processor Phone #: _____
2. Lender Credits, Discounts Fees or Broker Credits Amount	Processor Email: _____
Lender Credit to Borrower	
Bonafide Discount Fee	
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