

### CD REQUEST INFORMATION

The following items are needed to request a CD:

- Completed Closing Disclosure Request Form.
- Loan must be locked and conditionally approved (cannot be suspended).
- Initial Loan Estimates and Locked Loan Estimates need to be sent.
- Copy of Hazard insurance showing premium (not required but preferred).
- Flood insurance is required if the property is in a flood zone.
- Copy of Title Report.
- Completed Settlement Statement (Pre-CD).
- Copies of all invoices (credit, appraisal, processing etc.)

### LOAN INFORMATION

Borrower Name: \_\_\_\_\_ Loan Number: \_\_\_\_\_

Estimated Closing Date: \_\_\_\_\_

For an owner-occupied refinance, provide the following:

Spouse First Name: \_\_\_\_\_ Spouse Last Name: \_\_\_\_\_

Title Holder/Spouse Email: \_\_\_\_\_ Title Holder Name: \_\_\_\_\_

### FEE SCHEDULE

If there is no fee, please indicate "0."

	Balance due:	Paid to:	POC:	Broker Reimbursed?
Appraisal Fee:	\$ _____	\$ _____	\$ _____	\$ _____
Second Appraisal Fee: (if applicable)	\$ _____	\$ _____	\$ _____	\$ _____
Credit Report Fee:	\$ _____	\$ _____	\$ _____	\$ _____
Processing Fee:	\$ _____	\$ _____	\$ _____	\$ _____
<input type="checkbox"/> Please check if the processor is a third party.				
Other:	\$ _____	\$ _____	\$ _____	\$ _____

### SELLER/REALTOR CONCESSION

Seller Credit: \$ \_\_\_\_\_ Realtor Credit: \$ \_\_\_\_\_

### COMPENSATION/PRICING

See Lock Confirmation for details

Choose one:  Lender Paid  Borrower Paid \_\_\_\_\_ % \$ \_\_\_\_\_

Choose one:  Lender Credit  Discount Fee \_\_\_\_\_ % \$ \_\_\_\_\_

### BROKER/AGENT INFORMATION

#### Real Estate Broker (B)

#### Real Estate Broker (S)

#### Settlement Agent

Name: \_\_\_\_\_ Name: \_\_\_\_\_ Name: \_\_\_\_\_

ST License ID: \_\_\_\_\_ ST License ID: \_\_\_\_\_ ST License ID: \_\_\_\_\_

Contact: \_\_\_\_\_ Contact: \_\_\_\_\_ Contact: \_\_\_\_\_

Email: \_\_\_\_\_ Email: \_\_\_\_\_ Email: \_\_\_\_\_

### ESCROW/CLOSING AGENT INFORMATION

Below is to be completed by the Escrow/Closing agent/verbally confirmed with \_\_\_\_\_ on the items below.

Escrow waived: \_\_\_\_\_ Is the loan a New York CEMA? \_\_\_\_\_

Vesting: \_\_\_\_\_

Provide the email address where the closing documents should be sent: \_\_\_\_\_

Taxes:  Annually  Semi-Annually  Quarterly Tax Amount: \_\_\_\_\_ Taxes Due Date: \_\_\_\_\_

Location of Closing: City & State \_\_\_\_\_ County \_\_\_\_\_

Below is a list of documents that the Closing Agent needs to price and upload to the portal:

- Closing protection letter
- E&O and Fidelity Bond (NY only)
- Wiring instructions
- Power of Attorney (LMC approval and review are required prior to scheduling. See guidelines for details.)

Escrow/Attorney/Closing Agent: Must be signed up with Secure Insight unless they are a National Provider. NY Properties must use an attorney on LMCs approval list.

### NOTES/COMMENTS

Please provide any additional information you want to share with your team regarding this loan.

The broker must fully complete this form and upload it into the portal. Please ensure the items listed under escrow information are confirmed with the closing agent.

\_\_\_\_\_  
Authorized by Title Date