

TRANSACTIONAL CLOSING INSTRUCTIONS

BORROWER CONTACT INFORMATION

Borrower Name(s):

Phone Number:

Email:

Address:

PROPERTY INFORMATION

Subject Property Address(es):

APN (Assessor's Parcel Number):

Property Type:

Sales Price:

Seller Information:

LOAN INFORMATION

Loan Amount:

Loan Type:

Loan Term:

Subject Loan Lien Priority:

Other Financing:

Home Equity Type:

Loan Purpose:

Interest Rate/Initial Interest Rate:

Occupancy Type:

Rescindable Transaction:

New Construction:

LENDER INFORMATION

Lender Name:

Lender Address:

MORTGAGE BROKER INFORMATION

Mortgage Broker Name:

Mortgage Broker Address:

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TRANSACTIONAL CLOSING INSTRUCTIONS(cont.)

LENDER INFORMATION (cont.)

Lender's Authorized Closing Contact:

Name:

Phone Number:

Email:

Address:

Mortgage Broker Contact Information:

Name:

Phone Number:

Email:

Address:

Additional Contact Information:

Additional Contact Information:

Lender Loan Number:

Case Number:

MERS MIN (Mortgage Identification Number):

SETTLEMENT AGENT INFORMATION

Settlement Agent Company:

Settlement Agent Address:

Settlement Agent Contact Information:

Name:

Phone Number:

Email:

Fax:

Settlement Agent File Number:

Contact "State Abbreviation" License ID, if applicable:

TITLE AGENT INFORMATION

Title Agent Company:

Title Agent Address:

Title Agent Contact Information:

Name:

Phone Number:

Email:

Fax:

Title Agent File Number:

ALTA Registry Number:

VESTING AND SIGNATURE INFORMATION

Borrower Vesting:

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TRANSACTIONAL CLOSING INSTRUCTIONS(cont.)

VESTING AND SIGNATURE INFORMATION (cont.)

Additional Signers:

Use of Power of Attorney (if authorized):

Trust(s) or Entities:

CRITICAL DATES

Date of Closing Instructions:	Disbursement by Settlement Agent Date:
Loan Signing (Consummation) Date:	Rate Lock Expiration Date:
Rescission Expiration Date (Earliest Possible Date):	Loan Commitment Expiration Date:
Lender Funds to Arrive Date:	Loan Document Expiration Date:
Closing (if different from consummation) Date:	First Payment Date:

TITLE INSURANCE REQUIREMENTS

Closing Protection Letter:

Named of Insured:

Policy Amount:
Lender Policy Type:

Additional Lender Policy Requirements:

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TRANSACTIONAL CLOSING INSTRUCTIONS(cont.)

CONDITIONS/STIPULATIONS

Conditions/stipulations that must be cleared prior to signing the loan documents:

HOA Fees/Liens:

Payment of Property Taxes and Recurring Property Charges:

Payoff of unsecured debts as condition of loan approval:

Title Insurance Exceptions:

Endorsements:

Survey:

Prepare and/or Provide Borrower Closing Disclosure:

Prepare and/or Provide Seller Closing Disclosure:

Prepare and/or Provide Settlement Statement/HUD-1:

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TRANSACTIONAL CLOSING INSTRUCTIONS(cont.)

CONDITIONS/STIPULATIONS (cont.)

Notify lender of all fees and charges applicable for the transaction:

Obtain lender authorization for any changes or discrepancies:

Notify lender if a mobile signing or mail away signing is requested/authorized:

Cash Back Allowed:

Subordination Required:

Lender Credits:

Approved Seller Credits:

Approved Other Credits:

Listing of Loan Fees:

Verify Proof of Identity for All Signers:

Holdback for Repairs or Work Completion:

Obtain and Review Evidence of Hazard Insurance:

STATE SPECIFIC INSTRUCTIONS

Include any supplemental instructions specific to the subject property state:

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TRANSACTIONAL CLOSING INSTRUCTIONS(cont.)

E-CLOSING INSTRUCTIONS AND REMOTE ONLINE NOTARY

Electronic Document Signing:

Electronic Notarization:

Remote/Online Notarization:

Lender Documents:

Non-Lender Documents:

Electronic Delivery of Documents:

POST SIGNING REQUIREMENTS

Documents required for review by lender to the lender's funds or to obtain approval of lender's funds/recording.

Recording of Documents:

Return of Excess Funds to Lender:

Notify lender before issuing customer refunds after final disbursement:

Post Close Contact Information:

DOCUMENT RETURN REQUIREMENTS

Completed Document Return:

Delivery of Final Title Policy:

WIRE AMOUNT VALIDATION

Breakdown of Lenders Net Wire:

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TRANSACTIONAL CLOSING INSTRUCTIONS(cont.)

WIRE AMOUNT VALIDATION (cont.)

Breakdown of funds needed to be returned to lender in non-net wire transaction:

Breakdown of funds to be disbursed to the Mortgage Broker or other third parties:

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