

CD Request Form



Loan # _____ Today's Date _____ Closing Date: _____

Borrower:

Co Borrower:

Non-Borrowing Spouse/Title Owner*:

Name:

Email*:

***Co-borrower, Non-Borrowing Spouse or Title Holder email cannot be the same as the applying borrower**

Additional names and emails to receive CD

CDs will be generated and electronically delivered on the business day requested if received before 2 pm local time. Requests received after 2 p.m. local time will go out the NEXT business day. You must allow a minimum of four (4) business days prior to closing for final CD to be prepared and electronically delivered to the borrower if this form is received by 2 p.m. local time or five (5) days if received after 2 p.m. local time. (Mail-Aways require four (4) extra business days in all cases.)

At a minimum ALL the documents & requirements listed in this section must be satisfied for the CD to be created

<input type="checkbox"/> The file is in Approved or Clear-to-Close status	<input type="checkbox"/> The rate must be locked and have at least 5 days remaining for purchase money or 8 days remaining for refinances.
<input type="checkbox"/> Appraisal in (and any re-inspections are in) and approved by the underwriter; all appraisal and inspection invoice(s) are uploaded. Please be clear whether broker or borrower paid for the appraisal(s)	<input type="checkbox"/> Current payoff statements are uploaded <input type="checkbox"/> Updated Settlement Service fee worksheet uploaded
<input type="checkbox"/> The title is clear and the final loan amount is set	<input type="checkbox"/> Settlement agent contact info provided and we have confirmed the wire instructions
<input type="checkbox"/> All tax information is in and uploaded	<input type="checkbox"/> HOI and other property insurance (flood, wind, etc.) invoices are uploaded
<input type="checkbox"/> If using 3 rd party processor, processor must have been previously approved and invoice is uploaded	<input type="checkbox"/> Credit Invoice and all other fee invoices have been uploaded to the system

	Settlement Agent Information	Real Estate Broker (Buyer) purchase only	Real Estate Broker (Seller) purchase only
Company Name			
Address :			
Contact Email Address			
Phone Number			
NMLS ID			
State License #			
Contact Name			
Contact NMLS ID			
Contact State Lic#			

Completed by: Name _____ Email _____ Phone Number _____