

LOAN SIGNING PREP SHEET

CONTACT INFORMATION

Name(s) of Borrower(s) _____ Home Phone _____

Signing Appointment Date/Time _____ Business Phone _____

Address _____ Phone (other) _____

Directions _____

eDocs Retrieved Date Retrieved _____ No. Pages Retrieved _____

Docs sent to Signing Agent Borrower Date Received _____ Borrower Copy? Yes No

Assignment Contact _____ Office Phone _____

_____ After Hours Phone _____

DOCUMENT INFORMATION

Two Right to Cancel Forms? Yes No Rescission Period Ends _____

Number of Documents to be Notarized _____ Number of Signatures to be Notarized _____

List Documents to be Notarized

- | | |
|---------|----------|
| 1 _____ | 6 _____ |
| 2 _____ | 7 _____ |
| 3 _____ | 8 _____ |
| 4 _____ | 9 _____ |
| 5 _____ | 10 _____ |

CHECK DOCUMENTS INCLUDED IN LOAN PACKAGE

- | | |
|--|---|
| <input type="checkbox"/> Addendum to Residential Loan Application | <input type="checkbox"/> Assignment of Ownership Documents |
| <input type="checkbox"/> Address Certification | <input type="checkbox"/> Assignment of Proprietary Lease |
| <input type="checkbox"/> Affidavit of Death of Spouse | <input type="checkbox"/> Authorization to Reverify |
| <input type="checkbox"/> Affidavit of Continuous Marriage | <input type="checkbox"/> Automatic Drafting Authorization |
| <input type="checkbox"/> Affidavit of Death of Joint Tenant | <input type="checkbox"/> Billing Rights |
| <input type="checkbox"/> Affidavit of Death of Spouse Survivorship | <input type="checkbox"/> Borrower Credit Program Disclosure |
| <input type="checkbox"/> Affidavit of No Debts/Liens | <input type="checkbox"/> Borrower's Affidavit |
| <input type="checkbox"/> Affidavit of Payment of Taxes | <input type="checkbox"/> Borrower's Certification and Authorization |
| <input type="checkbox"/> Affidavit of Settlement Agent | <input type="checkbox"/> Borrower's Disbursement Authorization |
| <input type="checkbox"/> Affidavit to Affirm Conveyance | <input type="checkbox"/> Borrower's Income Certification |
| <input type="checkbox"/> Affiliated Business Arrangement Disclosure | <input type="checkbox"/> Certificate of Loans to One Borrower |
| <input type="checkbox"/> Aggregate Analysis Trial Balance | <input type="checkbox"/> Certificate of Trust |
| <input type="checkbox"/> Aggregate Escrow Accounting Disclosure | <input type="checkbox"/> Certification of Trust |
| <input type="checkbox"/> Agreement for the Arbitration of Disputes | <input type="checkbox"/> Claim of Lien |
| <input type="checkbox"/> Appraisal Disclosure | <input type="checkbox"/> Closing Disclosure |
| <input type="checkbox"/> Assignment — General Request for Special Notice | <input type="checkbox"/> Commitment Letter |

continued on reverse side

- Compliance Agreement
- Consumer Credit Score Disclosure Conditions
- Corporate Quitclaim Deed
- Corporation Assignment Deed of Trust
- Deceased Joint Tenancy Affidavit
- Declaration of Abandonment of Declared Homestead
- Deed of Trust (or Mortgage)
- Errors and Omissions Correction Agreement
- Escrow Waiver
- Estoppel Affidavit (By Individual Giving Deed-In-Lieu of Foreclosure) — Full Reconveyance
- Fair Lending Notice
- False Statement/Employment/Occupancy Form
- Federal Equal Credit Opportunity Act Notice
- Fire Insurance Authorization
- First Payment Letter
- Flood Insurance Authorization
- FNMA 1009 Affidavit
- Good Faith Addendum
- Good Faith Estimate of Settlement Charges
- Grant Deed
- Hardship Letter
- Hazard Insurance Authorization
- Home Equity Line of Credit and Promissory Note
- Homestead Declaration
- Homestead Waiver
- HUD-1 Addendum
- HUD-1 Settlement Statement
- Impound Authorization
- Initial Escrow Account Disclosure
- Instructions to Escrow (Closing Instructions)
- Insurance Information Sheet
- Inter Vivos Revocable Trust as Borrower Acknowledgment
- Inter Vivos Revocable Trust Rider
- Interest Rate and Loan Fee Policy
- Interspousal Transfer Grant Deed
- Interspousal Transfer Grant Deed Community Property with Right of Survivorship
- IRS 4506 Request
- IRS 8821 Tax Information Authorization
- IRS Form 8821
- IRS W-9 Form
- Itemization of Finance Charges
- Joint Tenancy Grant Deed
- Lead Paint Disclosure
- Limited Power of Attorney
- Loan Conditions
- Loan Disbursement Summary
- Loan Estimate
- Long Form All-Inclusive Deed of Trust and Assignment of Rents
- Long Form Deed of Trust and Assignment of Rents
- Long Form Security — Land Contract
- Mortgage Broker Fee Disclosure
- Mortgagor's Affidavit for Master Home Equity Loan Policy and Certificate Program (Oath)
- Nearest Living Relative

- Non-Impound Notice
- Note
- Notice of Applicant to Receive Copy of Appraisal
- Notice of Right to Cancel
- Notice of Termination of "Right of First Refusal"
- Occupancy Affidavit
- Occupancy Affidavit and Financial Disclosure Status Conditions
- Overnight Fee Statement
- Partial Reconveyance
- Payoff Statement
- Privacy Policy (Optional)
- Property Locator
- Provider of Service Schedule
- Quitclaim Deed
- Release of Claim of Mechanics Lien
- Request and Authorization for Lender's Loss Payable Endorsement
- Request for Loss Payable Endorsement
- Request for Notice
- Revocation of Power of Attorney
- Riders to Deed of Trust (specify Rider below)

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- Section 255 Affidavit
 - Security Instrument Cover Sheet
 - Short Form Deed of Trust and Assignment of Rents (Individual)
 - Signature Affidavit
 - Signature Statement Acceptance of Terms and Conditions
 - Special Power of Attorney as to Real Property
 - Specific Release of Lien
 - State Application Disclosure
 - Statement of Information
 - Subordination Agreement — Existing Deed of Trust to Additional Advance
 - Subordination Agreement — Lease to Deed of Trust
 - Subordination Agreement (Form A) — Existing Deed of Trust to New Deed of Trust
 - Subordination Agreement (Form B) — New Deed of Trust to New Deed of Trust
 - Substitution of Trustee
 - Substitution of Trustee and Full Reconveyance
 - Terms of Your Loan
 - Transfer of Servicing Disclosure
 - Trust Certification
 - Truth in Lending Disclosure
 - Uniform Residential Loan Application
 - Verification of Important Loan Information
 - Warranty Deed

Other

- _____
- _____
- _____
- _____
- _____