

# LOAN SERVICING CHECKLIST



In an effort to smoothly board your loan we have included this check list. We will make every effort to communicate effectively with you at all times. Please help us make sure your loans with us are well taken care of by making sure each loan package is submitted to us in full and in a timely manner. If you already have properties with us for loan servicing, this new form will still need to be filled out, dated and signed so we can make sure you are aware of our expectations for loans going forward.

Please be advised, if an incomplete package is received for a loan, servicing of that loan may be delayed until ALL documents or items are received and may incur a RUSH FEE. When completed, please email your complete package to the email below. Also, feel free to contact us at the number or email below if you have any questions.

## PRIOR TO CLOSING:

- ☐ Complete Loan Setup Form: Borrower Information
- ☐ Complete W-9 for Borrower
- ☐ Complete Loan Setup Form: Seller/Lender Information
- ☐ Complete W-9 for Lender
- ☐ Complete Loan Setup Form: Underlying Information, if applicable
- ☐ Signed Loan Servicing Agreement
- ☐ Authorization to Release Information

## AFTER CLOSING:

- ☐ Copy of Deed of Trust(s)
- ☐ Copy of Promissory Note(s)
- ☐ Copy of Closing Disclosure/ Settlement Statement
- ☐ Copy of Tax Certificates, if escrow
- ☐ Copy of New Insurance Declaration Page, if escrow
- ☐ Setup fee for Boarding Loan
- ☐ Escrow Funding, if applicable

