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.

Please be advised, if an incomplete package is received for a loan, servicing of that loan will 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:

- ❏ Signed Loan Servicing Agreement (if first time using CTF Loan Servicing)
- ❏ Complete W-9 for Lender
- ❏ Borrower's Loan Servicing Set Up Form
- ❏ Complete W-9 for Borrower
- ❏ Provide Title Company and Closer Contact Information

AFTER CLOSING:

- ❏ Copy of Closing Disclosure/ Settlement Statement
- ❏ Copy of Promissory Note
- ❏ Copy of Deed of Trust
- ❏ Copy of Insurance Declaration Page
- ❏ Setup fee for Boarding Loan Payable to CTF Loan Servicing
- ❏ Escrow Funding Payable to CTF Loan Servicing (If applicable)

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