



Refinance Information

Property Address/ Description _____

Is this your primary residence? Yes ____ No ____

If no, where is your primary residence? _____

Borrower(s) Name:

Borrower One: _____ Phone: _____
(As it appears on current Deed)

Email: _____ SSN/FEI : _____

Borrower Two: _____ Phone: _____
(As it appears on current Deed)

Email: _____ SSN/FEI : _____

Current Mailing Address: _____

Are you borrowing in an LLC, Corporation, Trust, or any other entity? Yes ____ No ____

What is the name of your LLC, Corporation, Trust etc.? _____

Please email or fax us the entity documents:

LLC- Articles of Organization & Operating Agreement

Corporation- Articles of Incorporation & Corporate By-Laws

Trust- trust Agreement

Will all borrowers be attending closing? Yes: _____ No: _____

If no, package will be mailed to current address.

New Lender Information

1st Mortgage Lender

2nd Mortgage Lender

Company: _____

Company: _____

Contact Name: _____

Contact Name: _____

Phone Number: _____

Phone Number: _____

Email Address: _____

Email Address: _____

Mortgage Payoffs

1st Mortgage Company

2nd Mortgage Company

Company: _____

Company: _____

Phone Number: _____

Phone Number: _____

Account Number: _____

Account Number: _____

Estimated Payoff Amount: _____

Estimated Payoff Amount: _____

Homeowners Insurance

Insurance Company: _____ Phone: _____

Agent: _____ Email: _____

Please provide any addition information that may be relevant.

For a smooth closing:

FUNDS - All closing funds of \$5,000.00 or more must be wired. Failure to wire funds will cause a delay in closing. A link to download our wiring instructions will be provided prior to closing.

IDENTIFICATION - All Borrowers must bring a valid, government-issued photo ID to closing.

**WE APPRECIATE YOUR COOPERATION AND
LOOK FORWARD TO WORKING WITH YOU!**