

ESCROW OPENING FORM LOAN BROKER (REFI)

Borrower <u>FULL</u> Name: _____		SSN: _____	
Spouses Name : _____		SSN: _____	
Will the spouse be on title?	Y	N	Title Only Loan Only
Will they take title in a Trust*?	Y	N	<i>*COPY OF TRUST MUST BE PROVIDED TO ESCROW</i>
Trust Name? _____			
Address: _____			
Phone: _____		Email: _____	
How would they like to receive their paperwork?: broker email overnight			
<small>(If the buyer is an entity LLC, Corp, INC. respective documents must be provided)</small>			

LOAN BROKER INFO

Contact Info: _____		Email: _____	
Mailing Address (MUST PROVIDE): _____			
Phone#: _____		License#: _____	

TRANSACTION DETAILS:

<u>TITLE</u>			
Title Co: _____	Rep: _____	Contact#: _____	
Has the title order been opened?:	Y	N	
<u>NEW LOAN</u>			
New Loan Amount: _____	Bank Name: _____	New Loan #: _____	
Have the loan fees been quoted:	Y	N	
<small>(Please attach estimate)</small>			
Loss Payee for Insurance: _____			
CPL Address: _____			
Will you need a Proposed Insured Letter?:	Y	N	
Any Secondary Financing?:	Y	N	
2 nd Loan Amount: _____	Bank Name: _____	New Loan#: _____	
<u>CURRENT LOAN (S)</u>			
1st mortgage payment made to: _____			
Loan#: _____	Approx. Balance: _____		
Is there a current 2 nd ?:	Y	N	
Subordinating?:	Y	N	
2 nd mortgage payment made to: _____			
Loan#: _____	Approx. Balance: _____		
Line of Credit?:	Y	N	
<u>ADDITIONAL PARTIES</u>			
Buyer bills to be paid through escrow:	Y	N	
<small>(Adding bills later <u>WILL</u> cause a delay in closing)</small>			
Does the property have SOLAR PANELS:	Y	N	
Solar Panel Co.: _____			
Contact info: _____	Account #: _____		
Does the property have an HOA?	Y	N	
Contact Info: _____			
<u>INSURANCE INFO</u> <small>(must be disclosed at opening):</small>			
Broker name: _____	Contact Info: _____	Estimated Premium: _____	
Agent Name: _____	Contact info: _____	Policy#: _____	

ESTIMATED CONSUMMATION DATE: _____			FUNDING DATE: _____	COE DATE: _____
<u>LOAN DOCS MUST BE EMAILED TO MICHAEL@LANDMARKESCROW.COM ONLY!!!</u>				
Will borrower require a traveling notary?:	Y	N		
PLEASE NOTE: All fees, charges, credits, rents, costs and/or price changes WILL RESULT IN A DELAY OF CLOSING.				
SPECIAL INSTRUCTIONS: (Power of Attorney, other involved parties, special circumstances, anything we should be aware of)				