



# Expedited CD Request/Doc Order Request Form

Upload correspondence to the loan file  
For details and questions on how to use this form,  
contact your Account Executive or Account Manager

Request Date \_\_\_\_\_  Expedited CD (Prior to CTC) Loan Number \_\_\_\_\_ Lock Expiration Date \_\_\_\_\_  
Anticipated Signing Date \_\_\_\_\_

### Borrower Information (as they should appear on the docs)

Borrower Name (first, last) \_\_\_\_\_ Co-Borrower Name (first, last) \_\_\_\_\_

Non-Borrowing Spouse (if applicable) \_\_\_\_\_ Co-Borrower on Title Only  Yes  No

Vesting \_\_\_\_\_

POA (approval required prior to docs)  Yes (attach copy of POA)  No

### Property Information

Street Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_

### Property Type

SFR  Condo  PUD  MF Units \_\_\_\_\_

### Loan Purpose

Purchase  R/T Refi  Cash Out Refi

Owner Occupied  Non-Owner  2nd Home

### Compensation Plan

Borrower Paid

Comp Plan% \_\_\_\_\_

### Loan Information

Term -  30 Yrs,  15 Yrs,  \_\_\_ Yrs  \_\_\_ Arm Term

Loan Program \_\_\_\_\_

Appraised Value \$ \_\_\_\_\_

Full Loan Amount \$ \_\_\_\_\_

Sales Price \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ %

First Payment \_\_\_\_\_ Signing Date \_\_\_\_\_

Property Type \_\_\_\_\_

PUD or Condo Name \_\_\_\_\_

Escrow Holdback  Yes  No Impounds/Escrows  Yes  No

Taxes & Insurance

Taxes Only

Insurance Only

### Fees: Must match most recently disclosed LE and within APR tolerance. Please obtain most updated Title and Escrow Fees

#### Broker Fees

**1. Origination Charges** POC Amount

Underwriting Fees = \$1,499 \_\_\_\_\_ \$ \_\_\_\_\_

Mortgage Broker Fee \_\_\_\_\_ \$ \_\_\_\_\_

Processing Fee \_\_\_\_\_ \$ \_\_\_\_\_

**2. Lender Credits, Discount Fees or Broker Credits** Amount

Lender Credit To Borrower \_\_\_\_\_ \$ \_\_\_\_\_

Bonafide Discount Fee \_\_\_\_\_ \$ \_\_\_\_\_

**3. Required Services** Amount

Tax Service Fee \$81.00 \_\_\_\_\_

Appraisal Fee (invoice required) \_\_\_\_\_

POC  Yes  No

Bkr Reimbursed  Yes  No

Credit Report Fee (invoice required) \_\_\_\_\_ \$ \_\_\_\_\_

Flood Cert Fee (lender) \$14.00 \_\_\_\_\_ \$ \_\_\_\_\_

**Lender Fees Locked to Rate**  Yes  No

#### NextUS Lending Only:

Account Executive: \_\_\_\_\_

Account Manager: \_\_\_\_\_

Notes: \_\_\_\_\_

#### Broker Contact Information

Company Name \_\_\_\_\_

Loan Officer (first name, last name) \_\_\_\_\_

Email 1 \_\_\_\_\_

Phone 1 \_\_\_\_\_

Processor - (first name, last name) \_\_\_\_\_

Email 2 \_\_\_\_\_

Phone 2 \_\_\_\_\_

#### Escrow Company Information

Company Name \_\_\_\_\_ License # \_\_\_\_\_

Escrow Officer \_\_\_\_\_ License # \_\_\_\_\_

Phone \_\_\_\_\_ Email for DOCs \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_

#### Title Company Information

Company Name \_\_\_\_\_

Title Officer \_\_\_\_\_ Phone # \_\_\_\_\_

Email \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_

### Other Contact Information - PURCHASE TRANSACTIONS ONLY

#### A. PROPERTY SELLER REALTOR INFORMATION

Real Estate Company Name \_\_\_\_\_ License# \_\_\_\_\_

Agent Name \_\_\_\_\_ Email \_\_\_\_\_

Agent Phone \_\_\_\_\_ Agent License # \_\_\_\_\_

Address \_\_\_\_\_

#### B. BUYER/BORROWER REALTOR INFORMATION

Real Estate Company Name \_\_\_\_\_ License# \_\_\_\_\_

Agent Name \_\_\_\_\_ Email \_\_\_\_\_

Agent Phone \_\_\_\_\_ Agent License # \_\_\_\_\_

Address \_\_\_\_\_

#### C. PROPERTY SELLER INFORMATION

Property Seller Name \_\_\_\_\_ Address \_\_\_\_\_

#### Loan Officer Signature Line:

\_\_\_\_\_