



CD REQUEST FORM

E-mail CD requests to your Account Manager.

Upload all documentation to Broker Connect under label 00 – Attach and Upload all Documentation.

REQUIRED ITEMS FOR CD			
<input type="checkbox"/>	Conditional approval (loan cannot be in suspense)		
<input type="checkbox"/>	Completed appraisal must be in the file AT VALUE (if value is lower than expected, CD cannot be issued until final terms have been established)		
<input type="checkbox"/>	Rate must be locked and locked Loan Estimate must be signed or presumed received one business day prior to CD (signature required to demonstrate receipt unless sent at least 4 days prior to CD)		
<input type="checkbox"/>	Evidence of hazard insurance and flood insurance (if applicable) <u>OR</u> quote from company if EOI not available (quote/estimate acceptable for CD but policy must be provided prior to docs)		
<input type="checkbox"/>	Combined settlement statement (must be issued within the past 3 days)		
	<ul style="list-style-type: none"> ➤ Buyer/Seller side required on purchases ➤ Correct loan amount (must match current approval) ➤ All figures (including per diem interest, payoffs and prorations) must reflect estimated funding date 		
CONTACT INFORMATION			
LOAN NUMBER:		BORROWER NAME:	
ESCROW CONTACT NAME:		ESCROW CONTACT PHONE:	
EMAIL ADDRESS FOR DOC DELIVERY:			
LOAN INFORMATION			
VESTING:			
DESIRED FIRST PAYMENT DATE:			
IMPOUNDS:	<input type="checkbox"/> YES <input type="checkbox"/> NO		
WILL A POA BE USED? (Mgmt approval req.)	<input type="checkbox"/> YES <input type="checkbox"/> NO		
NAME OF ANY AFFILIATES (if applicable):			
BROKER FEE INFORMATION			
COMPENSATION TYPE:	<input type="checkbox"/> LENDER PAID <input type="checkbox"/> BORROWER PAID		
TOTAL COMPENSATION DUE:	\$		
TOTAL AFFILIATE CHARGES:	\$		
THIRD PARTY FEE INFORMATION (Must submit all invoices and proof of payment if broker is being reimbursed)			
3rd PARTY PROCESSING FEE (Must be Essex-approved)	\$		
APPRAISAL FEE	\$	<input type="checkbox"/> Due to Provider	<input type="checkbox"/> POC <input type="checkbox"/> BROKER REIMBURSEMENT
HOA CERT FEE	\$	<input type="checkbox"/> Due to Provider	<input type="checkbox"/> POC <input type="checkbox"/> BROKER REIMBURSEMENT
CIR/1004D	\$	<input type="checkbox"/> Due to Provider	<input type="checkbox"/> POC <input type="checkbox"/> BROKER REIMBURSEMENT
CREDIT REPORT	\$	<input type="checkbox"/> Due to Provider	<input type="checkbox"/> POC <input type="checkbox"/> BROKER REIMBURSEMENT