

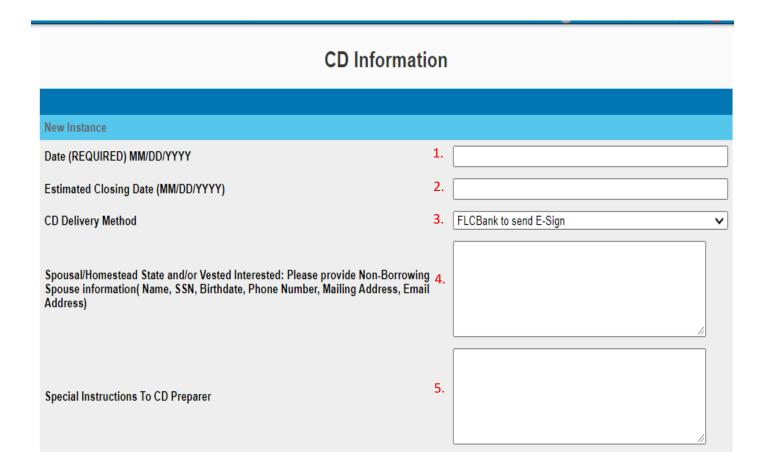
Online CD Information Screen Instructions

Client will select the *CD Information* option located under *Forms & Docs*. This screen is to be completed to meet the conditions of the loan for preparing the early CD.



Complete the steps below:

- 1. Date (REQUIRED) Please note: failure to complete this field will result in delays in processing.
- 2. Estimate Closing Date Enter the estimated signing date.
- 3. **CD Delivery Method** select the method of delivery via dropdown.
- 4. **Spousal/Homestead State and/or Vested Interest** provide the non-borrowing spouse information, if any, individual with a vested title interest in the property (rescindable transactions) or if the property is in a spousal/homestead state. Can list multiple people's information in this box.
- 5. Special Instructions to CD Preparer please convey any message to our CD Preparer



NOTE: You will only be asked to provide the contact information for the following if this is not already included on the Preliminary CD from Title.



Online CD Information Screen Instructions

- a. **Real Estate Company** (Buyer) The company information of the Buyer's Real Estate Broker. Enter the company's name, full address, and the company's State License ID.
- b. **Real Estate Agent** (Buyer) Enter the Buyer Real estate broker's First and Last name, the broker's State License ID, email address and phone number.
- c. **Real Estate Company** (Seller) The company information of the Seller's Real Estate Broker. Enter the company's name, full address, and the company's State License ID.
- d. **Real Estate Agent** (Seller) Enter the Seller Real estate Broker's First and Last name, the broker's State License ID, email address and phone number.
- e. **Settlement Agent Company** (all transactions) The company information of the Settlement Agent/Closing Company. Enter the company's name, full address, and the company's State License ID.
- f. **Settlement Agent** (all transactions) Enter the Settlement Agent's First and Last name, the broker's State License ID, email address and phone number.
- g. Seller(s) information (purchases only) Enter all Seller's First and Last name as well as their full addresses.

Once the screen is completed with the information requested, please select Save/Close.

| ******The below information is required if it has NOT already been provided on the Preliminary CD from Title****** | ******The below information is required if it has NOT alread 🗸 |
|---|--|
| Real Estate Company (Buyer) PURCHASE Only (Company name, Address, St License ID) | a. |
| Real Estate Agent (Buyer) PURCHASE Only (Contact Name, ST license ID, Email, Phone) | b. |
| Real Estate Company (Seller) PURCHASE Only (Company name, Address, St License ID) | C. |
| Real Estate Agent (Seller) PURCHASE Only (Contact Name, ST license ID, Email, Phone) | d. |
| Settlement Agent Company (ALL TRANSACTIONS) (Company Name, Address, ST License ID) | e. |
| Settlement Agent Name (ALL TRANSACTIONS) (Contact Name, ST License ID, Email, Phone) | f. |
| Seller(s) Information (PURCHASE only) Name, Address | g. |
| Save/Close Cancel | |