



Document Preparation Checklist

To be submitted along with our Document Preparation Order Form

Borrower Information:

- 1003 Residential Loan Application
- Statement of Information for Borrower
- Trust Certification form if either Borrower(s) are vested in a trust
- Phone and Fax numbers for Borrower (s)
- Email address Borrower (Monthly & ACH Statements are sent via email if possible)
- If Borrower are Corporations or LLCs:
 - Operating Agreement
 - Statement of Information
 - Corporate Resolution
 - Articles of Organization / Incorporation
- W-9 Borrower

Lender Information:

- Completed Lender Identification Sheet
- Trust Certification form if any of Lender(s) are vested in a trust
- Phone and Fax numbers for Borrower and Lender(s)
- Email address Lender(s) (Monthly & ACH Statements are sent via email if possible)
- ACH / Direct Deposit
- W-9 Lender

Property Information:

- Evidence of insurance (Dec page preferred)
- Appraisal or Comps of subject property

Loan Information:

- Scheduled Close of Escrow: _____
- Senior lien information (current statement is best)
- Authority to receive Information form (if this loan is a junior lien)
- Escrow instructions
- Title Prelim