

Closed Mortgage Loan Document Checklist

Loan# _____

Mortgagee:

Lender Sent	Closing Agent Ret Limed	Lender Received	
_____	_____	_____	1. Closed Mortgage Loan Document Checklist
_____	_____	_____	2. Note Original and 1 Copy
_____	_____	_____	3. Addendum to Note - Original and 1 Copy
_____	_____	_____	4. HUD-1 Settlement Statement Original and 1 Copy
_____	_____	_____	5. Escrow Account Statement
_____	_____	_____	6. Monthly Payment Letter
_____	_____	_____	7. Property Tax Information
_____	_____	_____	8. Private Mortgage Insurance Disclosure / Certificate
_____	_____	_____	9. Deed of Trust/Mortgage
_____	_____	_____	10. Rider (if applicable)
_____	_____	_____	11. FNMA 1003 / FHLMC 65 Mortgage Application
_____	_____	_____	12. Federal Truth in Lending Statement
_____	_____	_____	13. Occupancy Affidavit
_____	_____	_____	14. Address Notification Letter
_____	_____	_____	15. IRS Form W-9
_____	_____	_____	16. IRS Form 4506
_____	_____	_____	17. Notice of Right to Cancel (Refinances Only)
_____	_____	_____	18. Errors and Omissions
_____	_____	_____	19. Title Policy / Binder
_____	_____	_____	20. Survey or Survey Affidavit
_____	_____	_____	21. Flood Insurance Acknowledgement
_____	_____	_____	22. Pest Inspection Report (if applicable)
_____	_____	_____	23. ACH Agreement
_____	_____	_____	24. Any Other Documents Required by Underwriter or Closing Agent
_____	_____	_____	25. Instructions to Closing Agent
_____	_____	_____	26. Amortization Table
_____	_____	_____	27. Hazard Insurance Policy (place in front of permanent file)

PAYMENT METHOD (PLEASE CIRCLE ONE):

ACH **COUPONS**
Automatic Withdrawal

NOTE TO CLOSING AGENTS
 Please return all required documents Acco-Fastened (DO NOT STAPLE) at the top in the order stated above. Staple all checks to the bottom of this page.

ATTACH ALL CHECKS HERE.

