

Refinance Escrow Opening Sheet

1025 Sentinel Drive, Suite 106, La Verne, CA 91750
Phone: (909) 542-0162 - Fax: (909) 542-1072

Please provide the borrower's authorization form, mortgage statement(s), HOA statement(s) and insurance declaration page.

Broker Name _____ Date _____

Company Name _____

Broker Address _____

Broker City _____ Zip Code _____

Broker Phone _____ Fax _____ Email _____

Property Address _____

Primary Borrower _____ SSN _____ DOB _____

Co-Borrower _____ SSN _____ DOB _____

Mailing Address _____

City _____ State _____ Zip Code _____

Primary Borrower Work Phone _____ Email _____

Co-Borrower Phone _____ Email _____

Occupancy Owner-Occupied Non Owner-Occupied

Vesting Husband & Wife as Joint Tenants Husband & Wife as Community Property

Single Man / Single Woman Unmarried Man / Unmarried Woman

Married Man / Married Woman Trust

Is a Transfer of Title Necessary? Yes NO

If Yes: From Trust From Co-Borrower Other: _____

Payoff Lender's Information

1st TD Lender Payoff Name

Loan No. _____ Phone _____ Fax _____

Is this a FHA Loan? Yes NO Impounds? None Property Taxes Hazard Insurance

2nd TD Lender Payoff Name

Loan No. _____ Phone _____ Fax _____

3rd TD Lender Payoff Name

Loan No. _____ Phone _____ Fax _____

Home Owners Association Information

Is this property in a Home Owners Association? Yes NO

If Yes, are there there any required documents? Yes NO

If Yes, state documents and instructions.

Title Insurance Information

Title Company _____ Phone _____

Title Officer _____ Fax _____

Email _____

Title Representative _____ Phone _____

Email _____

Hazard Insurance Information

Company Name _____ Agent Name _____

Policy Number _____ Phone _____ Fax _____

Notes and Special
Instructions

Please provide the borrower's authorization form, mortgage statement(s), HOA statement(s) and insurance declaration page.