

# TRUST ONE

MORTGAGE CORPORATION

Account Executive: \_\_\_\_\_

## Equity HELOC Doc Request

Fax completed form and current title report or copy of most current deed of record to Trust One @ (949) 450-1850.

Loan Number: \_\_\_\_\_

Borrower: \_\_\_\_\_

Loan Amount: \_\_\_\_\_

Property State: \_\_\_\_\_

Application Date: \_\_\_\_\_

Index: \_\_\_\_\_

Margin: \_\_\_\_\_

Interest Rate: \_\_\_\_\_

Pricing \_\_\_\_\_

(Cost is +; Rebate is -): \_\_\_\_\_

Approved for Loan Pgm: «GEN\_Prog\_Name\_Code»

Select Program (X)	Loan Program:	Term	Draw	Repay	3 mo Teaser	Max * Fees
	3400 HGIO	15	15 IO	Balloon		8%
	3400 HGIOt	15	15 IO	Balloon	x	8%
	3400 HG15	15	10 IO	5		8%
	3400 HG15t	15	10 IO	5	x	8%
	3400 HG30	30	10 IO	20		8%
	3400 HG30t	30	10 IO	20	x	8%
	3900 CH	25	10 IO	15		8%
	3900 CHt	25	10 IO	15	x	8%

All HELOCs must follow State Guidelines for Max Fees in: GA NM UT VA

Lender/Broker Fees Included in APR Calc	Amount	Pay to Broker	Pay to Lender	POC
Administration	\$205		X	
Application Fee				
Credit Fee				
Discount Points				
Fee				
Flood Cert				
Messenger/Courier				
Notary/Doc Signing				
Origination Fee				
Processing				
Underwriting	\$400		X	
Close Out Fee Buyout			X	

### Broker Must Provide:

1. Legal Description
2. Complete Vesting
3. Property Address
4. Title Co. Name
5. E-mail Doc Recipient:

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

-or- Shipping Instructions for Docs:

3rd Party Fees Included in APR Calc	3rd Party Fee (Bill Required)	Pay to:	POC
Email Docs	\$		
**Settlement/Escrow			
**Notary/Doc Signing			
Other Title Fee		Paid to Title	
**Processing			

Other Non-APR Fees	3rd Party Fee (Bill Required)	Pay to:	POC
Appraisal Fee	\$		
Broker Appraisal Fee		Paid to Broker	
Lender Appraisal Fee		Paid to Lender	
Attorney		Paid to Title	
Title Fee		Paid to Title	
Title Search / Abstract		Paid to Title	
Title Examination		Paid to Title	
Recording Fee		Paid to Title	
City/County Tax		Paid to Title	
State Tax Stamp		Paid to Title	
Intangible Tax		Paid to Title	
Doc Stamp Tax		Paid to Title	

**TOTAL FEES** \$ \_\_\_\_\_

*For Trust One Internal Use Only:*

Confirmed by: \_\_\_\_\_

Rate & Fees Confirmed with: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Note: The ENTIRE Equity Line will be disbursed at funding.

Note: Trust One does NOT cover Broker cost. All cost to this loan will be deducted from the Broker fees. Broker responsible for any fees not disclosed here. All fees assumed to be charged to Borrower unless otherwise indicated. Broker is responsible to refund any fee charged that is not included on Doc Order or that is more than indicated on Doc Order.

6. Broker Federal Express #: \_\_\_\_\_

7. Other Special Conditions: \_\_\_\_\_

Broker: «GEN\_Broker» \_\_\_\_\_

Contact: \_\_\_\_\_

Email: \_\_\_\_\_

«GEN\_Broker\_Ph\_AC»

Phone: «GEN\_Broker\_Phone» \_\_\_\_\_

«GEN\_Broker\_Fax\_AC»

Fax: «GEN\_Broker\_Fax» \_\_\_\_\_



# Title Fee Certification

Loan Number:

Borrower:

Property Address:

Address to send deed/mortgage for recording:

Title Company: \_\_\_\_\_

Title Address: \_\_\_\_\_

Order Number: \_\_\_\_\_

Title Contact: \_\_\_\_\_

Title Phone: \_\_\_\_\_

Fees confirmed with \_\_\_\_\_ of \_\_\_\_\_

Title Fee: \_\_\_\_\_

Recording Fee: \_\_\_\_\_

State tax stamp fee: \_\_\_\_\_

Other (please specify): \_\_\_\_\_

By signing below I certify that I have verified the above title fees and that I have provided the proper address and order # for use in recording the deed. I further certify that any outstanding fees due in excess of the above will be the responsibility of:

«GEN\_Broker».

Signed \_\_\_\_\_

Title \_\_\_\_\_

THIS FORM MUST BE COMPLETED IN IT'S ENTIRETY TO ENSURE DOCS & FUNDING.

*Internal Use Only – To be completed by Trust One*

1. Verify address and order # provided by client
2. Verify fees provided by client
3. Advise contact person
4. Deed of Trust will be going out Certified Mail on \_\_\_\_\_.
5. Trust One Mortgage will call to verify receipt of Deed of Trust and/or confirmation of recording.