

(Please complete this Form using Adobe. It may not render properly in a browser/preview window.)

Refi Pre-Closing Questionnaire For Borrower's Settlement Agent - California

Top ½ of Form should be completed by Borrower or Lender before emailing to the Settlement Agent

Subject Property Address:

Estimated Closing Date:

Borrower's Real Estate Agent:

Borrower's Name(s):

Borrower's Phone Number(s):

Borrower's Email Address(es):

Lender's Name(s):

Lender's Phone Number(s):

Lender's Email Address(es):

Lender's Relationship to Borrower:

Loan Amount:

Additional Administrative Contact:

National Family Mortgage ® | Docs@NationalFamilyMortgage.com | 888.636.1990 X 110

For completion by the Borrower's Settlement Agent and to be returned to the Borrower/Lender ASAP

1. Name of Settlement Company that will conduct the Borrower's loan closing:

2. Best contact(s) (escrow assistant / officer) at Settlement Company that will conduct the Borrower's loan closing:

Contact #1

Name:

Phone:

Email:

Team Email (if any):

Contact #2

Name:

Phone:

Email:

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3A. Subject Property is a:

3B. Subject Property Tax ID:

☐ Single Family Home ☐ Two-Family Home

☐ Condominium > > > > > > Association Name for Rider:

☐ Planned Unit Development > > > > HOA Name for Rider:

4. Please confirm the exact legal vesting for how the Borrower(s) currently holds the Deed/Title or will hold the Deed/Title as owner(s) of the subject property:

5. Title Insurance

Please confirm the following costs to the Buyer/Borrower:

Is Lender's Title Insurance a requirement for your office to close and record the Deed of Trust? ☐ Yes ☐ No

Lender's Basic Title Insurance Policy to guarantee lien position: \$

Lender's Extended Title Insurance Policy with customary endorsements: \$

Lender's Closing Protection Letter or equivalent (if available): \$

6. Trustee to the Deed of Trust

Typically, the Title Company conducting the real estate closing and/or issuing the Title Insurance is willing to serve as the initial Trustee to the Deed of Trust as a no cost courtesy. Please confirm:

Trustee Name:

Trustee Address:

7. Deed of Trust Recording

Will your office record the Deed of Trust electronically? ☐ Yes ☐ No

If you do not record electronically, for document tracking purposes, should the recording authority return the original, recorded Deed of Trust to your office or directly to the Lender?

☐ The recorded DOT will initially be returned by the municipality to our office

Our office address is:

☐ The recorded DOT will be mailed by the municipality directly to the Lender

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The Lender will confirm if requiring Lenders Title Insurance and Closing Protection Letter following review of quote above.

The Lender will email the Promissory Note and Deed of Trust to you, along with very simple instructions, between 1 – 2 weeks before the estimated closing date.

The Lender will disburse the loan directly to settlement per your instructions.

There will be **no need** to collect any loan origination fees, appraisal fees, pre-paid taxes/insurance, or per-diem interest at settlement.

The Deed of Trust should be recorded with the local government authority per standard procedures.

The original, recorded loan documents should be mailed directly to the Lender.

Please email this completed Form to:

Lender's Email Address(es):

Borrower's Email Address(es):

Many thanks for your time and help! We look forward to working with you!



Since launching in 2010, National Family Mortgage® has successfully helped 1,000s of US families, and their advisors, beat the bank and build family wealth with an intra-family mortgage.

Our optional, Dodd-Frank compliant loan servicing solution helps prevent legal problems, IRS scrutiny of large family loans, and protects family relationships.

- ✓ Email payment reminders & monthly statements
- ✓ All loan accounting
- ✓ Borrower/Lender payment app & processing
- ✓ No pre-payment penalties
- ✓ Annual IRS tax forms: Borrower 1098 | Lender INT-1099
- ✓ Customer support
- ✓ Payoff statement preparation and processing

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