

# How to Request a Closing Disclosure (CD)

- ❖ Click on the “Closing Center” button from the side menu.
- ❖ Complete all the Broker Required Actions.
  - Notify your Account Manager that you have uploaded your PTC D condition. The Account Manager will have to clear this condition for the Progress Milestone to be completed.
- ❖ Once all Loan Progress Milestones and all Broker Required Actions have been completed, the button to Order Closing Disclosures will open to allow you to place the order.

Closing Disclosures Process Order Closing Disclosures

### Loan Progress Milestones

Closing Disclosure Requirement	Status	Milestone Reached?
All PTC D conditions must be cleared	0 of 1 PTC D conditions cleared	Needed
Loan must be in Conditional Approval Status	Loan Submitted	Needed
One day wait after disclosure of a Loan Estimate	Post-lock LE has not been disclosed yet	Needed

### Broker Required Actions

Closing Disclosure Requirement	Status	Date Completed	Action
Provide Anticipated Signing Date	✓		Signing Date: 5/6/2024
Loan must be locked	Needed		<span>Lock Loan</span>
All PTC D conditions must be uploaded for review	Needed		<span>Upload PTC D Conditions (1)</span>
Title Company Information	Needed		<span>Title Company Information</span>
Settlement Company Information	Needed		<span>Settlement Company Information</span>
Validate Vesting Information	Needed		<span>Validate Vesting Information</span>
Validate Trust Information	Needed		<span>Validate Trust Information</span>