

# How to Request a Closing Disclosure (CD)

(1) After selecting the loan from your pipeline, click on the “Closing Center & CD” button.

Loan Number : 3909306 Cond'l Approval Closing Center & CD  
Alice Firstimer / 1 Dovecreek, Irvine, CA 92618

\$807,000.00 Loan Amount	53.800% LTV	53.800% / 53.800% CLTV / HCLTV	37.002% / 38.115% Top / Bottom DTI	0.00 DSCR	MAX30 Program	5.990% Rate	710 Credit Score
-----------------------------	----------------	-----------------------------------	---------------------------------------	--------------	------------------	----------------	---------------------

Status & Agents   Application -   Pricing/Credit -   Closing Costs -   AUS   Loan Info -   Disclosures -   Rate Lock   E-docs   Conditions   Request -

(2) Complete all the Broker Required Actions:

- a. PTCDs: Once you have uploaded your PTCDs, your Account Manager (AM) will be notified to review and clear. You can confirm it's been cleared by your AM once the “Loan Progress Milestone” and the Broker Required Action for this item shows a blue check mark.

Loan Progress Milestones		
CLOSING DISCLOSURE REQUIREMENT	STATUS	DETAIL
All PTCB conditions must be cleared	<input checked="" type="checkbox"/>	1 of 1 PTCB conditions cleared

Broker Required Actions			
CLOSING DISCLOSURE REQUIREMENT	STATUS	DATE COMPLETED	ACTION
Loan must be locked	Locked	12/11/2025	
All PTCB conditions must be uploaded for review	<input checked="" type="checkbox"/>		

- b. Enter Title/Escrow contact information. You can pick from the drop down or you can just manually enter the contact information.

<p>Escrow Company <span>Edit</span></p> <p>Company Name [Redacted]</p> <p>Address [Redacted]</p> <p>Phone [Redacted]</p> <p>Contact Name [Redacted]</p> <p>Email [Redacted]</p> <p><input type="checkbox"/> An affiliate of the lender   <input type="checkbox"/> An affiliate of the originator</p>	<p>Title Company <span>Edit</span></p> <p>Company Name [Redacted]</p> <p>Address [Redacted]</p> <p>Phone [Redacted]</p> <p>Contact Name [Redacted]</p> <p>Email [Redacted]</p> <p><input type="checkbox"/> An affiliate of the lender   <input type="checkbox"/> An affiliate of the originator</p>
--	---

- c. If you want to request to review the CD before it's sent to the borrower, enter this information in the “CD Request Comments” box. Otherwise, the CD will automatically be sent out without preview.

- d. If you have any additional comments that you'd like for the CD Drawer to know, enter this information into the "CD Request Comments" box.

CD Request Comments Update Comments

- e. Enter your estimated Closing Date.

Important Dates Save Dates

Estimated Closing

12/10/2025

- f. Enter your vesting. If the vesting you need is not listed in the drop-down box, select "Other" from the drop down and then a box will appear to manually enter the vesting.

Vesting Information Validate

Borrower Relationship Title

\* Alice Firstimer Other Description

Other

Manner in which title will be held (Final Relation):

- (3) 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.

Status & Agents   Application -   Pricing/Credit -   Closing Costs -   AUS   Loan Info -   Disclosures -   Rate Lock   **E-docs**   Conditions   Request -

---

Closing Disclosure → Order Closing Disclosure

You are all set! A copy of your order request can be found in the "eDocs" tab. Please check our website for our most current CD Turn Times [here](#).

Loan Progress Milestones		
CLOSING DISCLOSURE REQUIREMENT	STATUS	DETAIL
All PTCD conditions must be cleared	✗	0 of 1 PTCD conditions cleared
Loan must be in Approval Status	✓	Cond'l Approval 11/26/2025
One day wait after disclosure of a Loan Estimate	✓	Date of last disclosed LE is 11/24/2025

Broker Required Actions			
CLOSING DISCLOSURE REQUIREMENT	STATUS	DATE COMPLETED	ACTION
Loan must be locked	Not Locked		<a href="#">Lock Loan</a>
All PTCD conditions must be uploaded for review	✗		<a href="#">Upload PTCD conditions (1)</a>

**Escrow Company** [Edit](#)

[Company Name](#)

[Address](#)

[Phone](#)

[Contact Name](#)

[Email](#)

**Title Company** [Edit](#)

[Company Name](#)  
First American Title Company

[Address](#)  
18500 Von Karman Avenue, Suite 600  
Irvine, CA 92612

[Phone](#)  
(949) 885-2400

[Contact Name](#)

[Email](#)

An affiliate of the lender     An affiliate of the originator

**CD Request Comments** [Update Comments](#)

**Important Dates** [Save Dates](#)

Estimated Closing

12/24/2025

**Vesting Information** [Validate](#)

Borrower Relationship Title

\* Alice Firstimer

Other

afaf

Manner in which title will be held (Final Relation):