

How to Request Mega Team to Prepare CD

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

Loan Number : 3909306 Cond'I Approval

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

Closing Center & CD

Status & Agents

Application

Pricing/Credit

Closing Costs

AUS

Loan Info

Disclosures

Rate Lock

E-docs

Conditions

Request

(2) Complete all Broker Required Actions:

- a. **PTCDs:** Once your PTCDs are uploaded, your Account Manager (AM) will be notified to review and clear. You can confirm clearance once the Loan Progress Milestone and the Broker Required Action for this item both display a blue check mark.

Loan Progress Milestones		
CLOSING DISCLOSURE REQUIREMENT	STATUS	DETAIL
All PTCD conditions must be cleared		1 of 1 PTCD conditions cleared

Broker Required Actions			
CLOSING DISCLOSURE REQUIREMENT	STATUS	DATE COMPLETED	ACTION
Loan must be locked	Locked	12/11/2025	
All PTCD conditions must be uploaded for review			

- b. **Title/Escrow Contact Information:** Select from the drop-down or manually enter the contact information.

Escrow Company

Edit

Company Name

Address

Phone

Contact Name

Email

☐ An affiliate of the lender

☐ An affiliate of the originator

Title Company

Edit

Company Name

Address

Phone

Contact Name

Email

☐ An affiliate of the lender

☐ An affiliate of the originator

- c. **CD Request Comments:** If you have any additional comments for the CD Drawer, enter them in the "CD Request Comments" box.

CD Request Comments

Update Comments

d. **Estimated Closing Date:** Enter your estimated closing date.

Important Dates

Save Dates

Estimated Closing

12/10/2025

e. **Vesting:** Enter your vesting. If the vesting you need is not listed in the drop-down, select "Other" and a text box will appear to manually enter it.

Vesting Information

Validate

Borrower Relationship Title

* Alice Firstimer

Other

Other Description

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

(3) Once all Loan Progress Milestones and Broker Required Actions have been completed, the "Request Mega Team to Prepare CD" button will become available to place your order.

Status & AgentsApplicationPricing/CreditClosing CostsAUSLoan InfoDisclosuresRate LockE-docsConditionsRequest

Request Mega Team to Prepare CD

CD will be sent out without a draft being sent for review. Turn times are 24-48 hours.

Request Mega Team to Send CD

1

Proceed to Self-Disclosed CD

Self-prepared, real-time, figures reviewed / Clearance of PTCD conditions is not required.

Proceed to Self-Disclosed CD

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](#).