

peirsonpatterson, llp
attorneys at law

Document Ordering Guide

Registration

Before you begin, you will need to register in order to login into ppdocs.com. To begin, click on the “**Register**” link on our homepage.

The screenshot shows the top navigation bar of the ppdocs.com website. It includes the company logo, a search bar, and links for 'Download Documents', 'login', and a list of menu items: 'Home', 'Services', 'Resources', 'FAQ', 'News', 'Contact', and 'Account'. The main banner features a man in a suit holding a tablet, with the text 'Stay Compliant' and a 'Learn more' button. Below the banner are three columns: 'LOGIN' with input fields for email and password, a 'Remember me' checkbox, and a 'Login' button; 'REGISTER' with a green arrow pointing to a 'Register' button and the text 'Are you a new customer? Registering is quick and easy!'; and 'REQUEST LIVE DEMO' with a 'Sign up' button and the text 'Not sure where to start? Sign up for live demonstration.' The footer contains 'PPDocs, Inc.' with a description of the company, and 'Our Services' with links to 'TRADITIONAL PRODUCTS' (Residential Mortgage) and 'EXPRESS PRODUCTS' (Early Disclosures).

ppdocs,inc Download Documents login Search...

[Home](#) [Services](#) [Resources](#) [FAQ](#) [News](#) [Contact](#) [Account](#)

Stay Compliant

Compliance review because accuracy is key.
Our systems have 100,000 checkpoints to keep you covered.

[Learn more >](#)

LOGIN
e-mail
password
 Remember me
I forgot my password. [Login >](#)

REGISTER
Are you a new customer? Registering is quick and easy!
[Register >](#)

REQUEST LIVE DEMO
Not sure where to start? Sign up for live demonstration.
[Sign up >](#)

PPDocs, Inc.
PPDocs, Inc is powered by PeirsonPatterson, LLP, a law firm specializing in the preparation of residential real estate documents nationwide.

Our Services

- [TRADITIONAL PRODUCTS](#)
 - [Residential Mortgage](#)
- [EXPRESS PRODUCTS](#)
 - [Early Disclosures](#)

Registration

Fill in your information and read the Terms of Service. If you are okay with the terms, click “**I accept the terms**” to continue.

Home > Register(1 of 5)

Note:

The requested information is required to establish your account.

To verify your email address we will send you an email containing an activation code.

You will need access to this email to successfully activate your account.

ACCOUNT INFORMATION

*If you are only trying to retrieve documents, you do NOT have to register. Please proceed to pick up documents [here](#)

Personal Information

First Name:

Last Name:

Company:

Address:

Suite:

City, State Zip: ,

Phone, Ext:

Fax:

Industry Sector:

Email and Password

Email:

Retype Email:

Create Password:

Retype Password:

I agree to the PPDocs Terms of Service and Privacy Policy.



Registration

You will get an e-mail containing your activation code. Enter it in the field provided and click the “**Activate...**” button.

Download Documents login Search...

ppdocs,inc

Home Services Resources FAQ News Contact Account

Home > Register(2 of 5)

ACCOUNT ACTIVATION

We've sent your activation link to: **cg25145@hotmail.com**

To activate the account please fill in the information below.

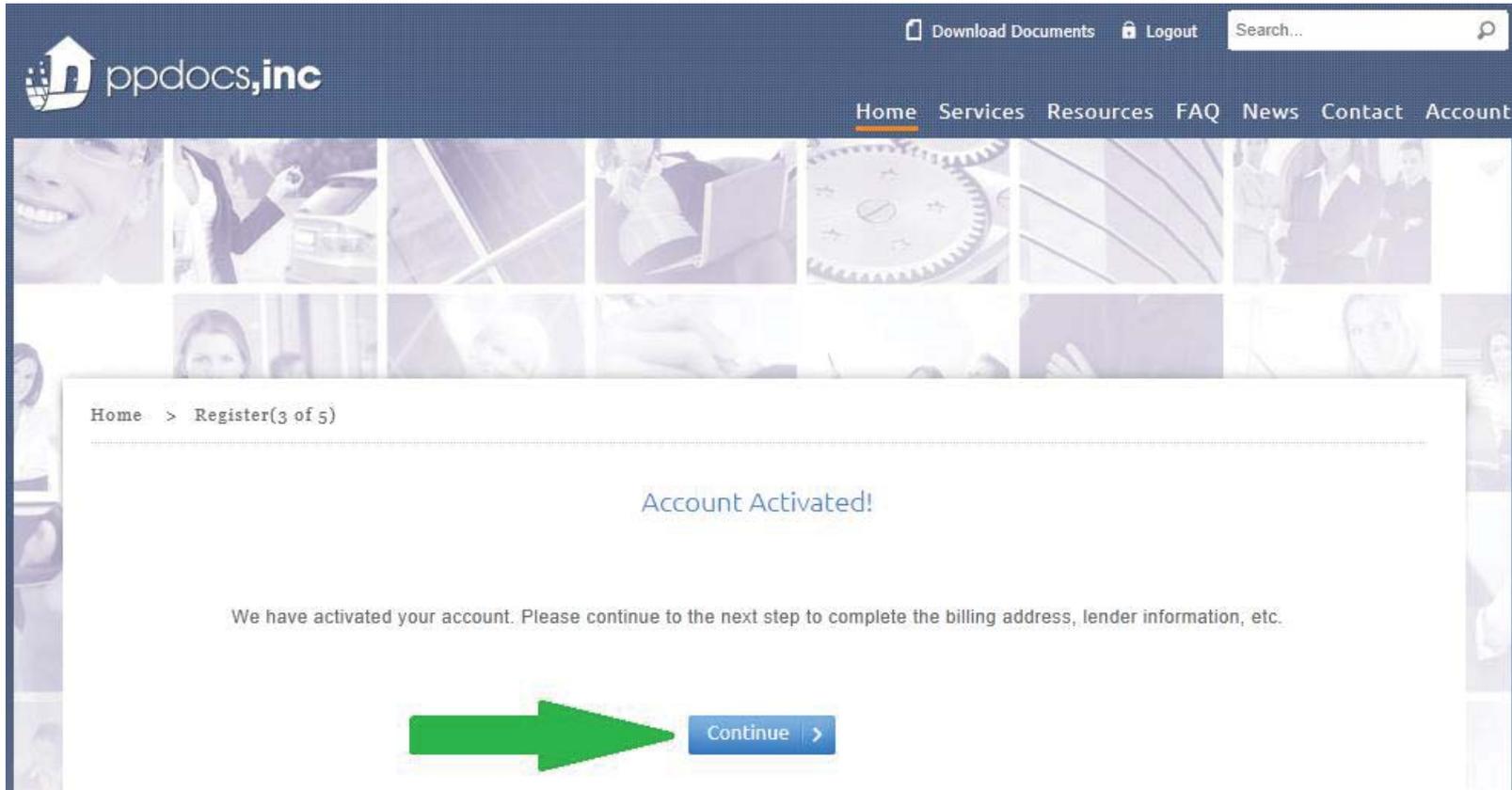
Registered Email:

Activation Code:

Activate >

Registration

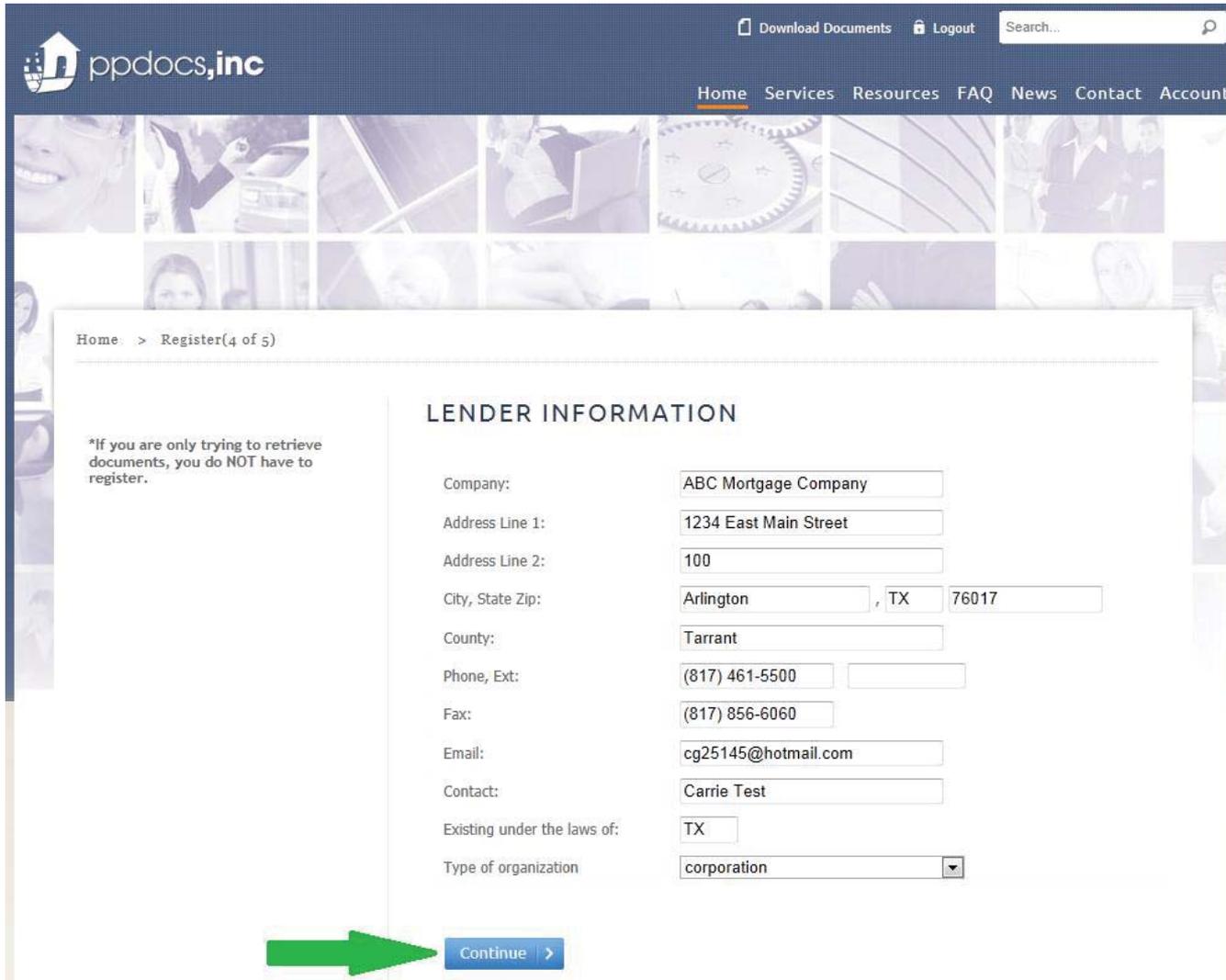
You now have an account for ppdocs. Now, before you start ordering documents, we want to get a profile created for you. Click the “**Continue...**” button to begin the setup of your default profile.



The screenshot shows the top navigation bar of the ppdocs,inc website. It includes the logo, a search bar, and links for Download Documents, Logout, Home, Services, Resources, FAQ, News, Contact, and Account. Below the navigation bar is a banner with various images. The main content area displays a breadcrumb trail: Home > Register(3 of 5). The central message reads "Account Activated!". Below this, a text block states: "We have activated your account. Please continue to the next step to complete the billing address, lender information, etc.". At the bottom, a large green arrow points to a blue "Continue >" button.

Registration

Help us learn more about you for your default profile. Enter your county, the state in which your organization is headquartered, the type of organization, and click Continue.



The screenshot shows the registration page for ppdocs,inc. The page has a dark blue header with the logo on the left and navigation links (Home, Services, Resources, FAQ, News, Contact, Account) on the right. A search bar is also present. Below the header is a banner image with a grid of small photos. The main content area is white and contains a breadcrumb trail: Home > Register(4 of 5). The central form is titled "LENDER INFORMATION" and contains the following fields:

Company:	ABC Mortgage Company
Address Line 1:	1234 East Main Street
Address Line 2:	100
City, State Zip:	Arlington, TX 76017
County:	Tarrant
Phone, Ext:	(817) 461-5500
Fax:	(817) 856-6060
Email:	cg25145@hotmail.com
Contact:	Carrie Test
Existing under the laws of:	TX
Type of organization	corporation

At the bottom of the form is a blue "Continue >" button, which is highlighted by a large green arrow pointing to it from the left.

*If you are only trying to retrieve documents, you do NOT have to register.

Registration

Please take a moment to complete our brief survey to better help us meet your needs.

Home > Register(5 of 5)

Please fill complete the survey. The information given will help us provide to you the best services and options for your specific needs.

***If you are only trying to retrieve documents, you do NOT have to register.**

SURVEY

Where did you hear about PPDocs.com?

How many orders do you estimate you will place with PPDocs.com per month?

What type of products are you most interested in?

Which investor do you sell your loans to?

If other, name of other Investor(s):

What loan origination system (LOS) does your organization use?

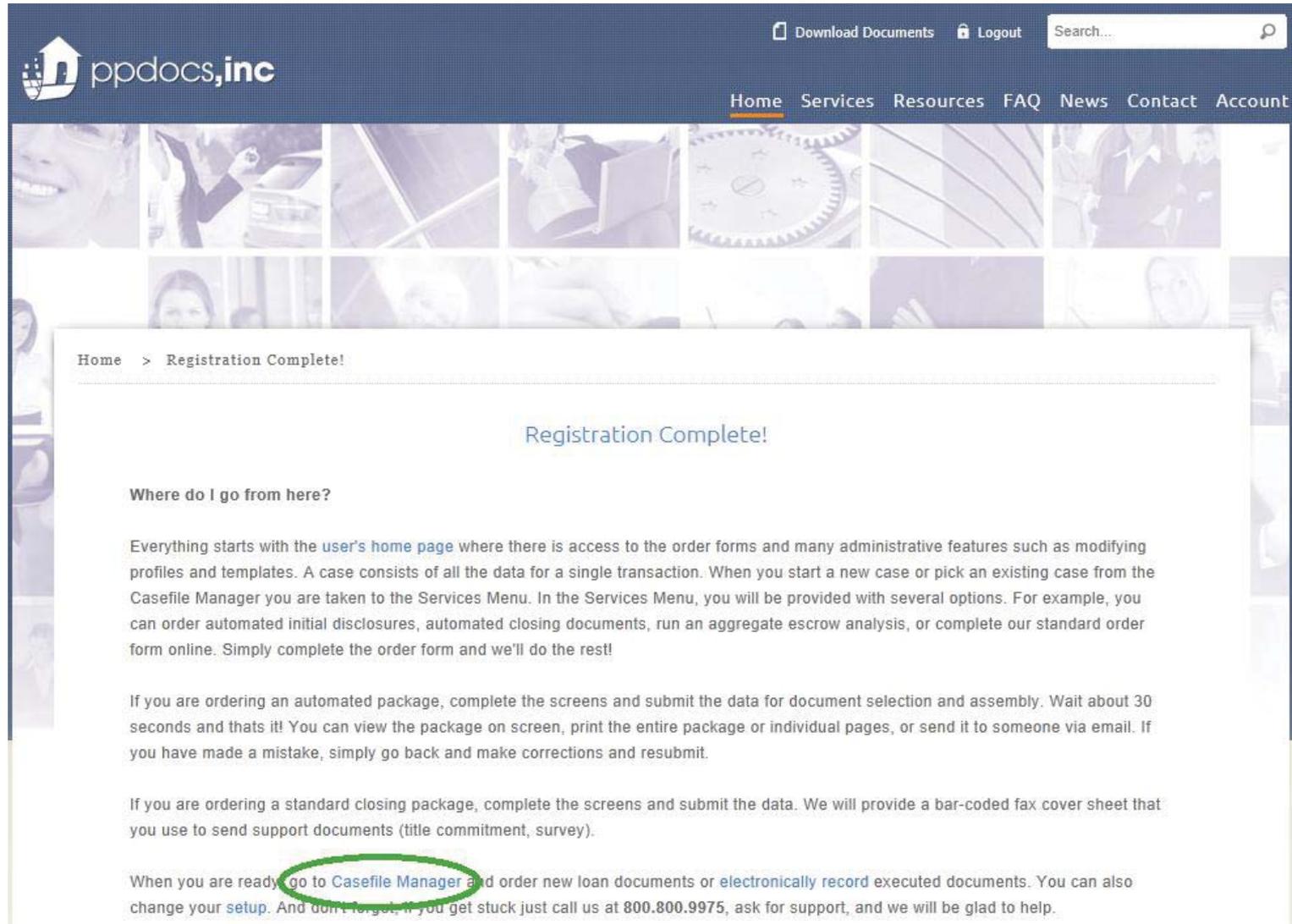
If other, name of other LOS:

Would you like to schedule training?

If yes, please choose where/when you would like training. We will contact you to discuss this in more detail.

Registration

You are now done with the registration process! If you are ready begin ordering documents, click on the “Casefile Manager” link.



The screenshot shows the top navigation bar of the ppdocs,inc website. It includes a logo on the left, a search bar on the right, and a menu with links for Home, Services, Resources, FAQ, News, Contact, and Account. Below the navigation bar is a banner image with a grid of small photos. A white message box is centered on the page, containing the text 'Registration Complete!' and instructions on where to go next. The text 'go to Casefile Manager' is circled in green.

Download Documents Logout Search...

ppdocs,inc

Home Services Resources FAQ News Contact Account

Home > Registration Complete!

Registration Complete!

Where do I go from here?

Everything starts with the [user's home page](#) where there is access to the order forms and many administrative features such as modifying profiles and templates. A case consists of all the data for a single transaction. When you start a new case or pick an existing case from the Casefile Manager you are taken to the Services Menu. In the Services Menu, you will be provided with several options. For example, you can order automated initial disclosures, automated closing documents, run an aggregate escrow analysis, or complete our standard order form online. Simply complete the order form and we'll do the rest!

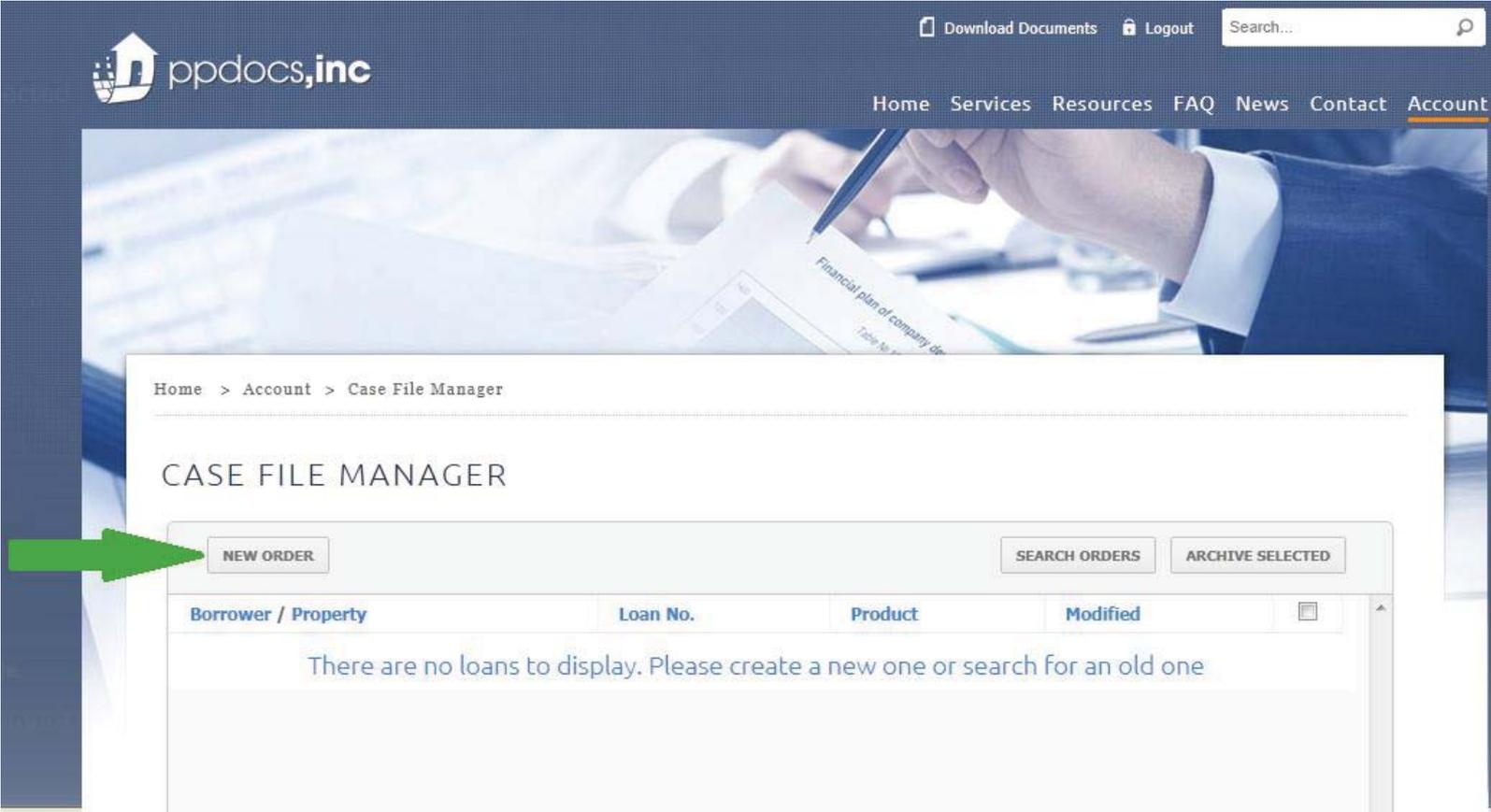
If you are ordering an automated package, complete the screens and submit the data for document selection and assembly. Wait about 30 seconds and that's it! You can view the package on screen, print the entire package or individual pages, or send it to someone via email. If you have made a mistake, simply go back and make corrections and resubmit.

If you are ordering a standard closing package, complete the screens and submit the data. We will provide a bar-coded fax cover sheet that you use to send support documents (title commitment, survey).

When you are ready, [go to Casefile Manager](#) and order new loan documents or [electronically record](#) executed documents. You can also change your [setup](#). And don't forget, if you get stuck just call us at 800.800.9975, ask for support, and we will be glad to help.

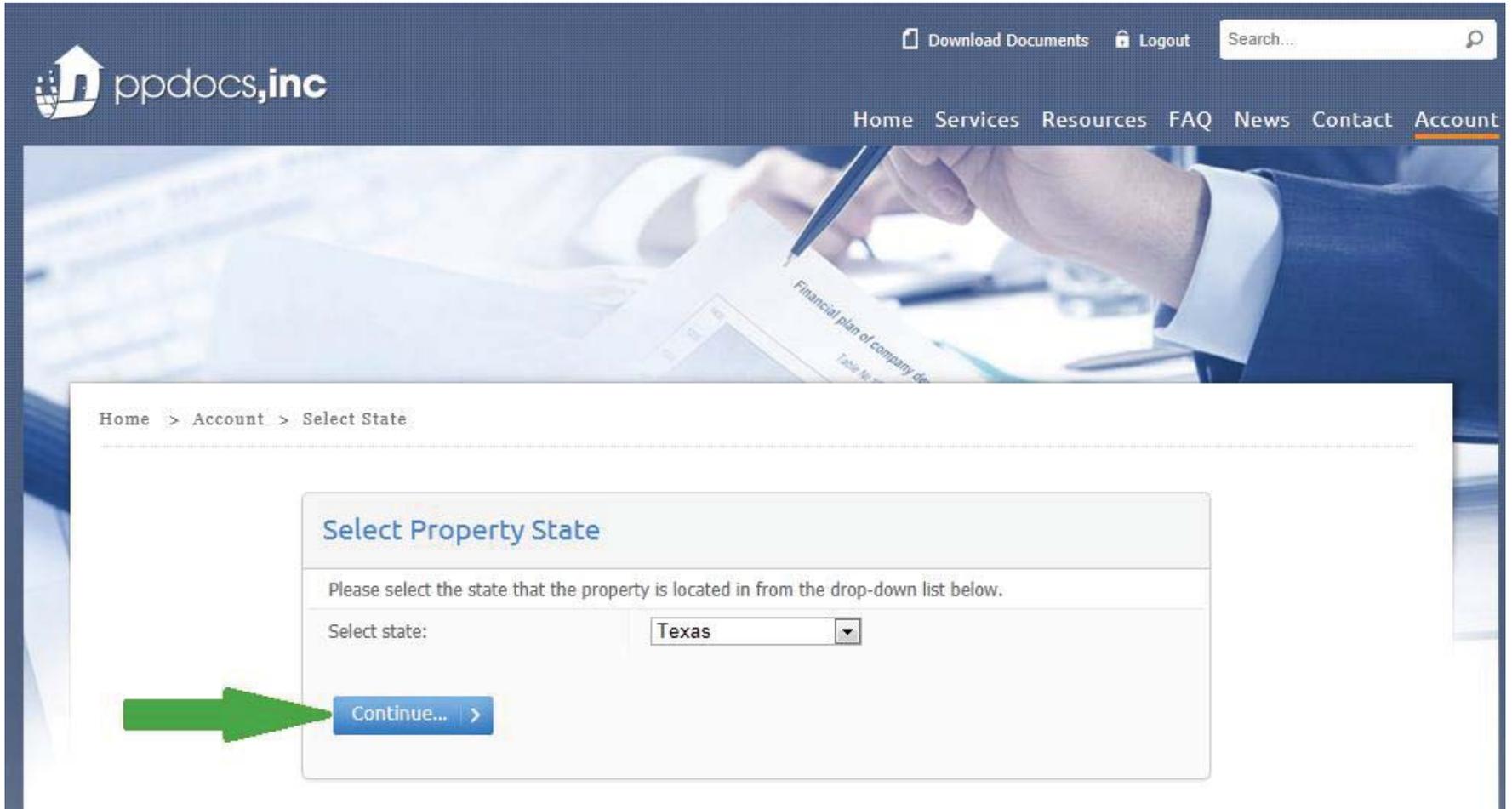
Ordering Initial Disclosures

Most clients will use our system to prepare their initial disclosures. The benefit is that when it comes time to ordering closing documents, all the GFE fees get nicely transferred to their appropriate HUD lines and we perform an audit on the fees to ensure compliance. To begin the ordering process, click on the “**New Order**” button at the top of the Casefile Manager.



Ordering Initial Disclosures

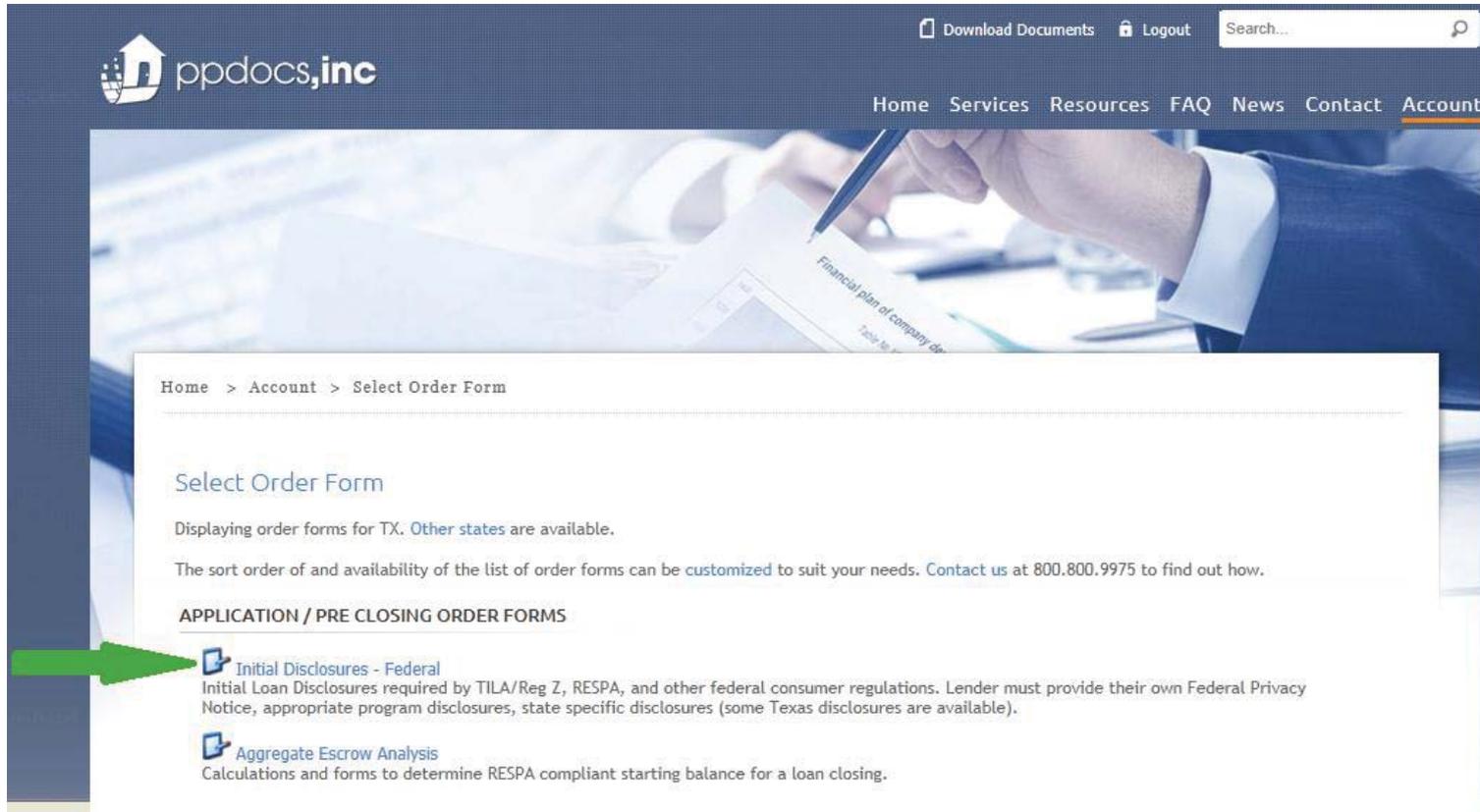
First, select the property state from the drop down list and click the “**Continue...**” button. This will help narrow down the types of products you can order for that state. Note: We do not prepare legal documents for the state of New York.



The screenshot shows the ppdocs,inc website interface. At the top left is the logo for ppdocs,inc. To the right of the logo are links for 'Download Documents' and 'Logout', and a search bar. Below these are navigation links for 'Home', 'Services', 'Resources', 'FAQ', 'News', 'Contact', and 'Account'. The main content area features a large image of hands reviewing documents. Below the image is a breadcrumb trail: 'Home > Account > Select State'. The 'Select State' section contains a form titled 'Select Property State' with the instruction: 'Please select the state that the property is located in from the drop-down list below.' The form includes a 'Select state:' label, a dropdown menu currently showing 'Texas', and a blue 'Continue... >' button. A green arrow points to the 'Continue... >' button.

Ordering Initial Disclosures

Second, select the order form for the corresponding transaction type that you wish to order. In this case, we will select the “Initial Disclosures – Federal” order form by clicking on the link.



The screenshot shows the ppdocs,inc website interface. At the top, there is a navigation bar with the company logo, a search bar, and links for 'Download Documents', 'Logout', and 'Search...'. Below the navigation bar, there is a main menu with links for 'Home', 'Services', 'Resources', 'FAQ', 'News', 'Contact', and 'Account'. The main content area features a background image of a person in a suit reviewing documents. A white box is overlaid on the page, containing the breadcrumb 'Home > Account > Select Order Form' and the heading 'Select Order Form'. Below the heading, there is text indicating that order forms are displayed for TX and that other states are available. A section titled 'APPLICATION / PRE CLOSING ORDER FORMS' lists two options: 'Initial Disclosures - Federal' and 'Aggregate Escrow Analysis'. A green arrow points to the 'Initial Disclosures - Federal' link.

Home > Account > Select Order Form

Select Order Form

Displaying order forms for TX. [Other states](#) are available.

The sort order of and availability of the list of order forms can be customized to suit your needs. [Contact us](#) at 800.800.9975 to find out how.

APPLICATION / PRE CLOSING ORDER FORMS

- [Initial Disclosures - Federal](#)
Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, state specific disclosures (some Texas disclosures are available).
- [Aggregate Escrow Analysis](#)
Calculations and forms to determine RESPA compliant starting balance for a loan closing.

Ordering Initial Disclosures

Next, you will select the service type you would like to order. We offer two different service levels, Full and Express. However, some products will only have one service type available. Click the **“Order”** link to the right of the service type you desire.

Download Documents Logout Search...

ppdocs,inc

Home Services Resources FAQ News Contact Account

Home > Account > Products

Initial Disclosures - Federal

Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, state specific disclosures (some Texas disclosures are available).

Select Service:

Express-Initial Disclosures - RESPA	\$10.00		ORDER
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WHAT IS EXPRESS SERVICE?

PPDocs, Inc. will NOT inspect, review, or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the document selection as needed. You may request multiple redraws as needed. There are no redraw fees.

Ordering Initial Disclosures

Finally, the loan information page will give you several options, but the one you will primarily be concerned with initially is the “Open Order Form” button. Click on it to launch the order form.

The screenshot shows the ppdocs,inc website interface. At the top, there is a navigation bar with links for Home, Services, Resources, FAQ, News, Contact, and Account. Below this is a breadcrumb trail: Home > Account > Case File Manager > Order Status. The main content area is divided into two sections. The first section, 'Loan Information', contains a table with the following data:

Borrower:	Borrower
Property:	, TX
Lender:	ABC Mortgage Company
Loan Number:	
Last Modified:	7/20/2012 2:20:12 PM
Profile:	Default
Template:	
Import:	

The second section, 'Selected Product', displays the product name 'Initial Disclosures - Federal' and a description: 'Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, state specific disclosures (some Texas disclosures are available)'. Below the description, it shows 'Service type: Express' and 'Fee: \$10.00'. At the bottom of this section, there are two rows of buttons: 'Open Order Form', 'Import Data', 'Export Data', 'View Data', 'Print Summaries' in the first row, and 'Clone Order', 'Create Template', 'Send Copy', 'Archive Order' in the second row. A green arrow points to the 'Open Order Form' button.

Ordering Initial Disclosures

Now, A quick overview of the order form. To navigate through the screens you will use the “Back” and “Next” button. Fields with a yellow background are required fields and you will not be able to continue unless they have some valid data inside of them. Fields with a green border will generally have a “F2” function. For instance, when you enter the zip code, hit the “F2” key on your keyboard to complete the city, state, and county. Also, use the “address book” to quickly complete information if you have entered it in the order form in the past. Click the “Next” button to continue to the next screen.

The screenshot shows a web browser window with the URL <https://www.ppdocs.com/online/site/weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2>. The page header includes the PPDocs logo and the text 'Borrower: Property: Loan Number: 123456789'. The main content area is divided into two sections: 'Order Information' and 'Billing Information'. The 'Order Information' section contains fields for 'Order Prepared by' (Lone Star Republic Bank), 'Phone Number' ((512) 234-5678), 'E-mail' (billing@loanstarpublicbank.com), 'Loan #' (123456789), 'Document fee' (paid by billing department), 'Barcode Reference' (Loan #), and 'Barcode Type' (Code 128). The 'Billing Information' section contains fields for 'Bill to Company' (Lone Star Republic Bank), 'Address 1' (P.O. Box 1234), 'Address 2', 'ZIP: City, State' (78701 Austin TX), 'Contact' (Disclosure Billing), 'Phone' ((512) 234-5600), 'Fax', and 'E-mail' (billing@loanstarpublicbank.com). A green arrow points to the 'Back' button, and another points to the 'Next' button. Several fields are highlighted in yellow, and the 'ZIP: City, State' field has a green border. At the bottom of the form, there are 'Save' and 'Close' buttons.

Order Information	
Order Prepared by	Lone Star Republic Bank
Phone Number	(512) 234-5678 Ext
E-mail	billing@loanstarpublicbank.com
Loan #	123456789
Document fee	paid by billing department
Barcode Reference	Loan #
Barcode Type	Code 128

Billing Information	
Bill to Company	Lone Star Republic Bank
Address 1	P.O. Box 1234
Address 2	
ZIP: City, State	78701 Austin TX
Contact	Disclosure Billing
Phone	(512) 234-5600 Ext
Fax	
E-mail	billing@loanstarpublicbank.com

Ordering Initial Disclosures

All you need to do is go through each screen and complete the information. Click the “Next” button to continue to the next screen.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/onlinesite/weborder/OrderForm3.aspx?LoanGuid=DF35C34BB8A44C61A855FF33DECF2CC9>. The page header includes the PPDocs,inc logo and the title "Initial Disclosures - Federal". On the right side of the header, it displays: Borrower: Property: 1234 Riverside Drive Loan Number: Below the header, there are "Back" and "Next" navigation buttons. A left-hand sidebar contains a menu of options: Order Information, Property Information (highlighted), Borrower(s), Initial Disclosure Matrix, Document Selection, Loan Information, Loan Detail, Document Preparation Fee, Escrow Information, GFE Information, Section 35 Analysis, Federal TIL Disclosure, Auditor, and Submit Request. The main content area is titled "Property Information" and contains a "Property Address" section. This section includes a dropdown for "Address Type" (set to "Address, City, State, Zip"), an "Address" field with "1234 Riverside Drive" and a note "*Hit 'F2' to verify address.", a "ZIP: City, State" field with "76017", "Arlington", and "TX", and a "County of" dropdown set to "Tarrant". At the bottom left of the form, a yellow box contains the instruction: "Enter zip code and press F2 to complete city, state, and county (when applicable)". At the bottom of the form, there are "Save" and "Close" buttons.

Ordering Initial Disclosures

Enter the borrower information. Change the “**Borrower Designation**” if the borrower is an entity or a trust. If you have additional borrowers, click the “**Add # Borrower**” box to display more borrower options. You can also edit the signature blocks by clicking on them. How it appears in that box is how it will print on the documents. Click the “**Next**” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
https://www.ppdocs.com/online/site/weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc
Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Order Information

Borrower(s)

Borrower #1 Information

Borrower Designation: Individual

Individual Information

First name: Daniel
Middle name:
Last name: Boone
Suffix:
E-mail address:
Status/Conjunction:
Mailing address: 3018 Edgewater Dr
ZIP: City, State: 78733 Austin TX

Signature Block - Click To Edit

Daniel Boone

Add 2nd Borrower

Borrower #2 Information

Borrower Designation: Individual

Individual Information

First name: Janet
Middle name:
Last name: Boone
Suffix:
E-mail address:
Status/Conjunction:

Save Close

Ordering Initial Disclosures

Now for the fun part. Answer the questions about the transaction so that we may make a determination about which disclosures to provide in the package. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/onlinesite/weborder/OrderForm3.aspx?LoanGuid=DF35C34BB8A44C61A855FF33DECFC2CC9

ppdocs,inc Initial Disclosures - Federal

Borrower: Daniel Boone
Property: 1234 Riverside Drive
Loan Number:

Back Next

Order Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Loan Information
Loan Detail
Document Preparation Fee
Escrow Information
GFE Information
Section 35 Analysis
Federal TIL Disclosure
Auditor
Submit Request

Initial Disclosure Matrix

Application Date	07/20/2012
Loan lien position	<input checked="" type="radio"/> First Lien <input type="radio"/> Subordinate Lien
Loan type	Conventional
Loan Purpose	Purchase
Interest rate	<input checked="" type="radio"/> Fixed <input type="radio"/> Adjustable
Is the property improved (i.e. has a house or other improvement on it)?	<input checked="" type="radio"/> Yes <input type="radio"/> No
The Property is	Primary Residence
Is property located in a flood area?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is loan covered by RESPA?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Has there been a changed circumstance?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Provide RESPA Settlement Cost booklet?	Scanned (a PDF version will be included in the package)
Is loan covered by Truth-in-Lending?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Lender to provide appraisal or notice?	<input type="radio"/> Provide copy of appraisal <input checked="" type="radio"/> Notice of Right to Receive an Appraisal
Lender paid private mortgage insurance?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is an insurance product or annuity solicited, offered or sold by Lender or an affiliate of the Lender?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Are there any affiliated business arrangements with any of the service providers?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Will lender escrow for taxes and insurance?	N/A

The Initial Disclosure Matrix pertains to the specifics regarding the Federal Initial Disclosures

Save Close

Ordering Initial Disclosures

Click on the “**Suggest Documents**” button to get a list of recommended disclosures for this transaction, based on the answers given on the previous page.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/online/website/weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection

Document Selection

Suggest Documents Additional Documents Sort Documents Remove All Upload Other

Current Document Selection

⚠ Document selection is empty. Please click the [Suggest Documents] button.

TIP: Do you see the same document every time you preview? It is an issue with your browser settings. Close this order form and then at the top of your browser window click on the "Tools" menu. Then click on "Internet Options" at the bottom. Then click on "Settings" in the "Browsing history" section. Go to where it talks about checking for newer versions of stored pages, select "Every time I visit the webpage". Finally, click "OK" at the bottom of both windows and go back into the order form and try to preview again. This should fix the problem permanently. Call Support at 800.800.9975 if you need further assistance.

Save Close

Ordering Initial Disclosures

Click on the "Select All" link at the top of the pop-up window and then click the "Accept" button.

The screenshot displays the PPDocs Loan Documentation Order Form Version 3.0. The browser address bar shows the URL: <https://www.ppdocs.com/onlinesite/weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6...A2>. The borrower information is Daniel Boone, Property: 3018 Edgewater Dr, and Loan Number: 123456789.

The main interface has a left sidebar with navigation links: Back, Next, Order Information, Lender Information, Property Information, Borrower(s), Initial Disclosure Matrix, and Document Selection. The main content area is titled "Document Selection" and includes buttons for "Suggest Documents", "Additional Documents", "Sort Documents", "Remove All", and "Upload Other".

A pop-up window titled "Document Selection" is open, showing a list of documents to be added. The "Select All/Select None" link at the top of the list is highlighted with a green arrow. The list includes:

- Transmittal Letter to Applicant with Receipt
- Good Faith Estimate (GFE)
- Acknowledgement of Receipt of Good Faith Estimate (GFE)
- Identified Settlement Service Providers (RESPA 2010)
- Notice of Intent to Proceed w/ Loan Application (RESPA 2010)
- Aggregate Escrow Account Entry
- Initial Escrow Disclosure
- TIL Disclosure
- APR & Finance Charge Summary
- Itemization of Amount Financed
- Discl.- Right to Receive Appraisal (Application Date)ECO
- Equal Credit Opportunity Act Notice
- Estimated Cash Required from Borrower at Closing
- Important Applicant Information (US Patriot Act Notice)
- Loan Options Disclosure (Anti-Steering Disclosure)
- Payment Analysis
- Texas Residential Construction Contract Disclosure

The "Accept" button at the bottom of the pop-up window is also highlighted with a green arrow. A second green arrow points to the "Tools" menu in the sidebar, with a tip: "TIP: Do you see the same... click on the 'Tools' menu... newer versions of stored p... again. This should fix the p...". Another tip on the right side of the pop-up window reads: "er form and then at the top of your browser window 'history' section. Go to where it talks about checking for... flows and go back into the order form and try to preview".

Ordering Initial Disclosures

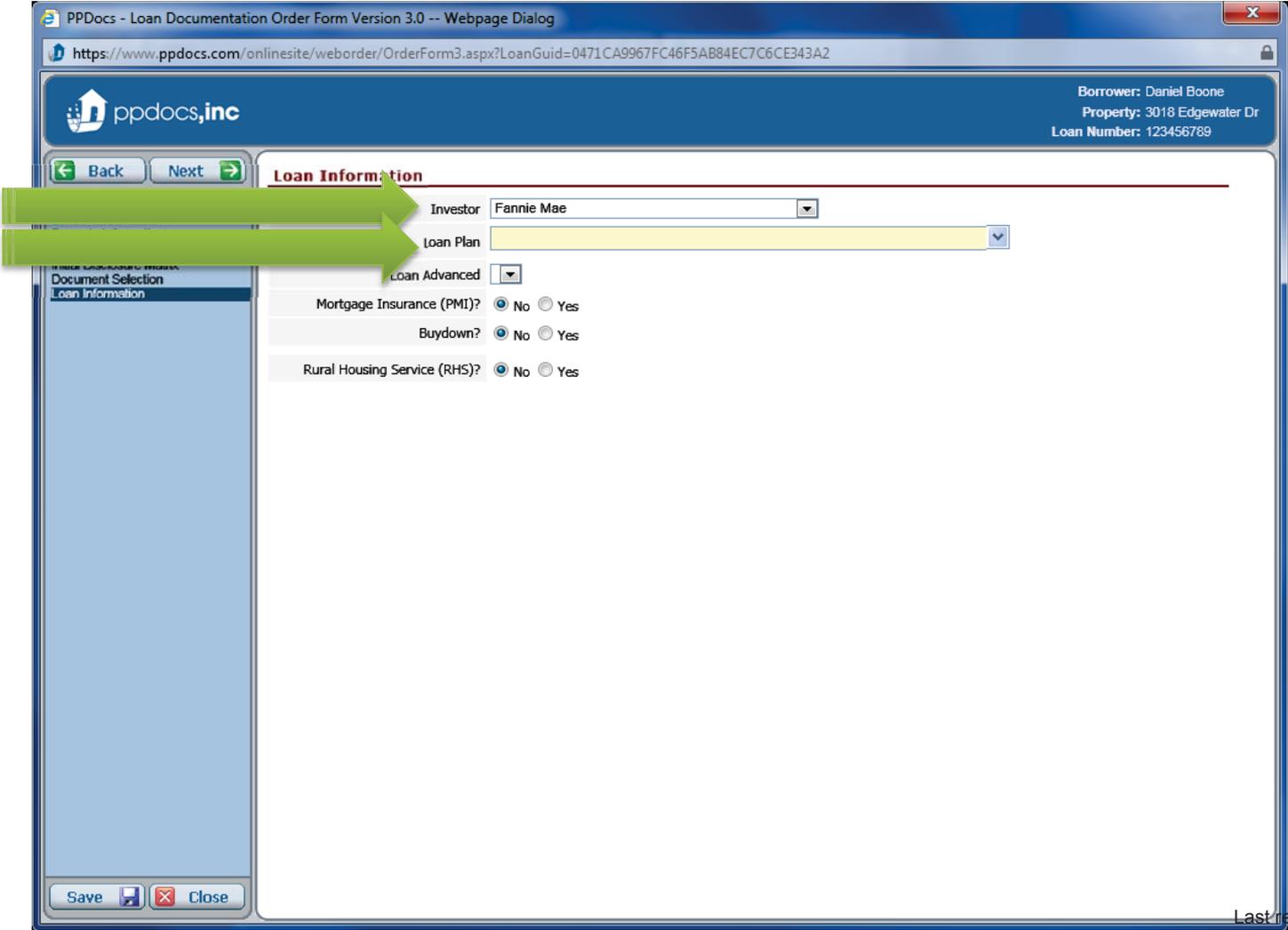
Once you have selected the disclosures, you may go through and change the order in which they will appear in the document package by clicking on the sort arrows in the left column. You can also **preview** each document or **remove** any unwanted documents from the selection. Click the “**Next**” button to continue to the next screen.

The screenshot shows the 'Document Selection' screen in the PPDocs application. The interface includes a navigation sidebar on the left with buttons for 'Back' and 'Next'. The main area features a 'Document Selection' header with buttons for 'Suggest Documents', 'Additional Documents', 'Sort Documents', 'Remove All', and 'Find Other'. Below this is a table of selected documents, each with a sort arrow, document information, a description, and 'Preview' and 'Remove' buttons. A green arrow points to the 'Document Selection' link in the sidebar, and two green arrows point to the 'Preview' and 'Remove' buttons in the table.

Sort	Doc Info	Description	Preview	Remove
▼	6200	Transmittal Letter to Applicant with Receipt	Preview	Remove
▲ ▼	1219	Good Faith Estimate (GFE)	Preview	Remove
▲ ▼	2104	Acknowledgement of Receipt of Good Faith Estimate (GFE)	Preview	Remove
▲ ▼	3574	Identified Settlement Service Providers (RESPA 2010)	Preview	Remove
▲ ▼	3767	Notice of Intent to Proceed w/ Loan Application (RESPA 2010)	Preview	Remove
▲ ▼	5907	Aggregate Escrow Account Entry	Preview	Remove
▲ ▼	5906	Initial Escrow Disclosure	Preview	Remove
▲ ▼	7022	TIL Disclosure	Preview	Remove
▲ ▼	5905	APR & Finance Charge Summary	Preview	Remove
▲ ▼	4013	Itemization of Amount Financed	Preview	Remove
▲ ▼	1115	Discl.- Right to Receive Appraisal (Application Date)ECOA	Preview	Remove
▲ ▼	3464	Equal Credit Opportunity Act Notice	Preview	Remove
▲ ▼	4195	Estimated Cash Required from Borrower at Closing	Preview	Remove
▲ ▼	6557	Important Applicant Information (US Patriot Act Notice)	Preview	Remove
▲ ▼	6869	Payment Analysis	Preview	Remove
▲ ▼	6473	Texas Residential Construction Contract Disclosure	Preview	Remove
▲ ▼	7760	TX Consumer Complaint Notice (State Chartered Banks and Trusts)	Preview	Remove
▲ ▼	1885	RESPA Servicing Disclosure Statement (Short Form)	Preview	Remove
▲ ▼	4645	FACT Act Notice to Home Loan Applicant	Preview	Remove
▲	6578	RESPA Settlement Cost Booklet	Preview	Remove

Ordering Initial Disclosures

You will then need to select the **Investor** and **Loan Plan** being used for this transaction. The Loan Plan will determine which Note will be given.



Ordering Initial Disclosures

First select the provider of the loan plan that you want to see. Then scroll through the suggestions and click on the loan plan that you would like to use. Once selected, click the "OK" button.

The screenshot shows the PPDocs web application interface. At the top, the browser address bar shows the URL: <https://www.ppdocs.com/onsite/weborder/OrderForm...?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2>. The page header includes the PPDocs logo and borrower information: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, Loan Number: 123456789. The main content area is titled "Loan Information" and shows a dropdown menu for "Inv" set to "Fannie Mae".

A "Loan Plans" dialog box is open, showing a list of loan plans under the heading "Other Loan Plans". The "Select Loan Program" dropdown is set to "Fannie Mae". The list includes:

- FNMA 3200 Fixed-Rate Note** (Note: 3200)
- FNMA 3255 Growing-Equity Note** (Note: 3255)
- FNMA 3260 Balloon + Adden 3266 & Rider 3180 Cond. Right to Refi.** (Note: 3260, Addendum: 3266, Rider: 3180)
- FNMA 3260 Balloon Negotiated without options** (Note: 3260)
- FNMA 3271 5, 10, or 15 year Fixed Rate Interest First** (Note: 3271)
- FNMA Biweekly Fixed Rate** (Note: 3264, Rider: 3177)

The "Loan Plan Details" section on the right shows the following information:

- Plan ID: 3200
- Program By: Fannie Mae
- Plan Name: FNMA 3200 Fixed-Rate Note
- Plan Number: 3200
- Documents: Note: 3200
- Prepayment Penalty: No
- Assumable: Not Allowed
- Lien Position: First
- Loan Type: Conv
- Interest Only Term: 0
- Payments Frequency: 12 payments per year

The dialog box has "Highlight", "OK", and "Cancel" buttons at the bottom. A green arrow points to the "Fannie Mae" dropdown menu, and another green arrow points to the "FNMA 3200 Fixed-Rate Note" option in the list.

Ordering Initial Disclosures

Change the “No” to “Yes” on any of the remaining items as applicable, and click the “Next” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/onlinesite/weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

Order Information
Lender Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Loan Information

Loan Information

Investor: Fannie Mae

Loan Plan: Fannie Mae / FNMA 3200 Fixed-Rate Note

Mortgage Insurance (PMI)? No Yes

Buydown? No Yes

Rural Housing Service (RHS)? No Yes

Save Close

Ordering Initial Disclosures

Complete the information as requested. Many of the fields will auto calculate for you. On any of the date fields, you can hit "F2" to have a helpful calendar pop up. When completed, click the "Next" button.

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

Loan Detail

Appraised Value	250,000.00
Sales Price	225,000.00
Loan Payoff	0.00
Down Payment	50,000.00
Loan Amount	175,000.00
Total Loan Amount	175,000.00
Loan to Value (LTV)	77.778 %
Prepared Date	08/11/2011
Interest Rate Lock Date	08/11/2011
Estimated Closing Date	08/29/2011
Settlement or Funding Date	08/29/2011
First Payment Date	10/01/2011
Interest Rate	4.125
Payment Frequency	Monthly
Interest Only Term	0
P&I (Amort.) Term	180
Loan Term	180
P&I Payment Amount	1,305.44
Number of Days Per Year	365
Per Diem Interest	3 day(s) @ 19.7774 per day = 59.3322
Late Charge	5.000 %
Grace Period	15 days

October 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Save Close

What will happen to the servinn

Ordering Initial Disclosures

Make any changes to the Federal Box (TIL) questions. If you haven't noticed, on the left hand side we show you a list of all the screens you have completed. Click the "Next" button when completed.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
https://www.ppdocs.com/onlinesite/weborder/OrderForm3.aspx?LoanGuid=DF35C34BB8A44C61A855FF33DECF2CC9

ppdocs,inc Initial Disclosures - Federal
Borrower: Daniel Boone
Property: 1234 Riverside Drive
Loan Number:

Next

Order Information
Lender Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Document Custom Fields
Loan Information
Loan Detail
Federal Box Disclosure
Document Preparation Fee
Escrow Information
GFE Information
Estimated Cash Due at Closing
Section 35 Analysis
Transmittal Letter
ECOA Notice
Federal TIL Disclosure
Auditor
Submit Request

The Federal Box Disclosure screen has a series of questions regarding the prepayment, lender offered insurance, and questions about the behavior of the loan

Save Close

Federal Box Disclosure

Is **Property Insurance** required to obtain credit? No. Yes.

Is **Flood Insurance** required to obtain credit? No. Yes.

Is there an **Itemization of Amount Financed** attached? No. Yes.

Does this loan have an **Interest Only Period**? No. Yes.

Will this loan have a **demand feature**? No. Yes.

Will there be a **required deposit**? No. Yes.

Is the **Lender the Seller**? No. Yes.

Is this loan **assumable**? No. Yes.

Is the **Annual Percentage Rate (APR)** an estimate? No. Yes.

Is the **Finance Charge** amount an estimate? No. Yes.

Is the **Amount Financed** an estimate? No. Yes.

Is the **Total of Payments** amount an estimate? No. Yes.

Is the **Total Sales Price** amount an estimate? No. Yes.

Is the **Payment Schedule** an estimate? No. Yes.

Prepayment:

Will the Borrower possibly **have to pay a penalty**? No. Yes.

Will the Borrower be **entitled to a refund** of part of the finance charge? No. Yes.

Lender Offered/Solicited Insurance: (not common)

Does the Lender offer or solicit an insurance or annuity product? No. Yes.

Ordering Initial Disclosures

So that we can automatically complete our fee and insert it into the GFE, we need to know what service type and product type you will be using when ordering closing documents. When completed, click the “**Next**” button.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: "https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2". The page header includes the PPDocs, Inc. logo and borrower information: "Borrower: Daniel Boone", "Property: 3018 Edgewater Dr", and "Loan Number: 123456789".

On the left side, there is a navigation menu with the following items: "Order Information", "Lender Information", "Property Information", "Borrower(s)", "Initial Disclosure Matrix", "Document Selection", "Loan Detail", "Federal Box Disclosure", and "Document Preparation Fee". The "Document Preparation Fee" item is currently selected and highlighted.

At the top of the main content area, there is a "Next" button with a right-pointing arrow. A green arrow points to this button from the left.

The main content area is titled "Document Preparation Fee" and contains the following text:

Document Preparation Fee is now a part of the Origination Charge.
The origination charge cannot change once it has been accepted by the Borrower.
To help better determine our fee, please select the appropriate service and product type for the closing documents.

Below this text are two dropdown menus:

Service Type: Full Service
Product Type: Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - RESPA [\$150.00]

A second green arrow points to the Product Type dropdown menu from the left.

Below the dropdown menus, there are three paragraphs of text:

If you would like a Warranty Deed to be prepared or reviewed, please add an additional \$100 to our defaulted attorney fee.

The fee that defaults is for loan amounts under \$1M. Our fee doubles for loans \$1M+, triples for loans \$2M+, etc. Please make the appropriate changes to the "Attorney for doc prep" amount contained in the "Details" section of "1. Our origination charges".

If one of the borrowers is a Trust, please add an additional \$100 to our defaulted attorney fee.

Settlement agent will be instructed to pay by separate check our portion of the fee.

At the bottom left of the form, there are "Save" and "Close" buttons.

Ordering Initial Disclosures

Complete the escrow information as needed. Enter in the number of payments per year, the payment due date, and the payment amount and we will calculate the breakdown along with the adjustment in the “**Aggregate Escrow Analysis Recap**” table at the bottom. When completed, click the “**Next**” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

Escrow Information

Escrow type: Aggregate Escrow Analysis

Aggregate Escrow Analysis Setup

First Escrow Payment Date: 10/01/2011

Cushions for MI: 0 (2 Max)

Cushions for Other: 2 (2 Max)

Other payment Description:

Other payment Amount:

Lines 1002-1009		Payments per year	Payment due date	Payment amount
1002	Homeowner's insurance	1	10/01/2012	2,132.00
1003	Mortgage insurance	0		
1004	Property taxes	1	12/01/2011	7,255.00
1005		0		
1006		0		
1007		0		
1008		0		
1009		0		

Aggregate Escrow Analysis Recap

1000.	Description	Months	Amount per month	Total amount due
1002.	Homeowner's insurance	2	177.67	355.34
1003.	Mortgage insurance	0		
1004.	Property taxes	11	604.58	6,650.38
1005.		0		
1006.		0		

Save [Print] [Close]

Ordering Initial Disclosures

The “Loan Summary” section should be automatically completed for you, so do not change anything in this section unless you know for sure you need it changed. You will need to complete the information below this section, starting with “Important Dates”. You can always click on any of the “?” for more information about that particular item.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Order Information
Lender Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Document Custom Fields
Loan Information
Loan Detail
Federal Box Disclosure
Document Preparation Fee
Escrow Information
GFE Information

GFE Information

Loan Summary	Sample GFE
Initial loan amount (Note amount)	175,000.00
Loan term	15 year(s)
Initial interest rate	4.125 %
Initial payment amount (Principal, Interest, and any MI)	1,305.44
Can the interest rate rise?	No
Can the loan balance rise?	No
Can your monthly payment amount rise?	No
Does loan have a prepayment penalty?	No
Does loan have a balloon payment?	No
Will there be an escrow account?	Yes
Is this an amended GFE?	No
Footnote	

Important Dates

1. Interest Rate for this GFE is available through	09/11/2011	?
2. Estimate for settlement charges is available through	08/25/2011	?
3. Must go to settlement within (rate lock period)	0 days	?
4. Number of days to lock interest rate before settlement	0 days	?

Your Adjusted Origination Charges

1. Our origination charge	Details	150.00	?
2. Charge/credit for specific rate	Details		?
A: Adjusted Origination Charge		150.00	?

Your Charges for All Other Settlement Services

3. Required services that the originator selects	Details		?
--	---------	--	---

Save Close

Last revised: Jul 30, 2012

Ordering Initial Disclosures

You will need to click on the “Details” buttons for some items to enter the itemized fee amounts with their descriptions. This allows us to assign appropriately to their corresponding HUD lines in the future.

The screenshot shows a web browser window with the URL <https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=047167FC46F5AB84EC7C6CE343A2>. The page title is "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The borrower information is: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, Loan Number: 123456789.

The left sidebar contains a navigation menu with the following items: Order Information, Lender Information, Property Information, Borrower(s), Initial Disclosure Matrix, Document Selection, Document Custom Fields, Loan Information, Loan Detail, Federal Box Disclosure, Document Preparation Fee, Escrow Information, and GFE Information.

The main content area displays a form with the following sections:

- Footnote**: [Text input field]
- Important Dates**:
 - 1. Interest Rate for this GFE is available through: 09/11/2011
 - 2. Estimate for settlement charges is available through: 08/25/2011
 - 3. Must go to settlement within (rate lock period): 0 days
 - 4. Number of days to lock interest rate before settle: 0 days
- Your Adjusted Origination Charges**:
 - 1. Our origination charge: 150.00 (Details button highlighted with a green arrow)
 - 2. Charge/credit for specific rate: [Amount]
 - A: Adjusted Origination Charge: 150.00
- Your Charges for All Other Settlement Services**:
 - 3. Required services that the originator selects: [Amount]
 - 4. Title services and lender's title insurance: [Amount]
 - 5. Owner's title insurance*: [Amount]
 - * Include footnote to borrower? [Text input field]
 - 6. Required services that borrower can shop for: [Amount]
 - 7. Government recording charges: [Amount]
 - 8. Transfer taxes: [Amount]
 - 9. Initial deposit for escrow account: 6,472.75
 - Includes: All taxes All insurance [Text input field]
 - 10. Daily interest charges: 59.33
 - 11. Homeowner's insurance: [Amount]
 - B: Charges for All Other Settlement Services: 6,532.08
 - A+B: Total Estimated Settlement Charges: 6,682.08
 - Complete the Tradeoff Table on the GFE? (optional): No

Ordering Initial Disclosures

In the detail boxes, complete the description, amount, and if the item isn't APR effective, uncheck the PFC box to excluded it from the finance charge calculation. *HINT: If you click on the PFC header, a helpful list of Finance Charges vs. Non Finance Charges will pop open for your reference.*

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

ppdocs,inc

Back Next

- Order Information
- Lender Information
- Property Information
- Borrower(s)
- Initial Disclosure Matrix
- Document Selection
- Document Custom Fields
- Loan Information
- Loan Detail
- Federal Box Disclosure
- Document Preparation Fee
- Escrow Information
- GFE Information

Footnote

Important Dates

1. Interest Rate for this GFE is available through 09/11

2. Estimate for settlement charges is available through 08/25

3. Must go to settlement within (rate lock period) 0 days

4. Number of

Components of Origination Charge

Your Adjusted	Fee Description	Borr \$	PFC	Sec32	HC	FNMA
1. Our origina	Loan origination fee	2,250.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2. Charge/cre	Lender's inspection fee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A: Adjusted C	Mortgage insurance application fee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Your Charg	Assumption fee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3. Required s	Underwriting fee	125.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4. Title serv	Processing fee	100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5. Owner's tit	Application fee	25.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* <input type="checkbox"/>	Review fee	25.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6. Required s	Closing fee	200.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7. Governme						
8. Transfer ta						
9. Initial deposit for escrow account				6,472.75		
Includes: <input type="checkbox"/> All taxes <input type="checkbox"/> All insurance						
10. Daily interest charges				59.33		
11. Homeowner's insurance	Details					
B: Charges for All Other Settlement Services				6,532.08		
A+B: Total Estimated Settlement Charges				6,682.08		
Complete the Tradeoff Table on the GFE? (optional)				No		

OK

Save Close

Last revised: Jul 30, 2012

Ordering Initial Disclosures

You will see that our fee will automatically appear in the “Attorney fee for docprep” area. Please do not change this unless you need to increase the fee for other services. Our fee is an additional \$100 (usually paid by the Seller, so only disclose if Seller is NOT paying for the Warranty Deed) if you would like for us to prepare a Warranty Deed. Our fee doubles if the loans is \$1-2 million dollars, triples for \$2-3 million, etc. When completed, click the “OK” button.

The screenshot shows the PPDocs Loan Documentation Order Form Version 3.0. The browser address bar shows the URL: https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2. The borrower is Daniel Boone, property is 3018 Edgewater Dr, and loan number is 123456789.

The 'Components of Origination Charge' dialog box is open, displaying the following table:

Item	Amount	Check 1	Check 2	Check 3	Check 4
Closing fee	200.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Amortization fee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Escrow waiver fee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attorney fee for docprep	150.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Required s		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4. Title servic		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5. Owner's tit		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6. Required s		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7. Governmen		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8. Transfer ta		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The 'OK' button is highlighted with a green arrow.

Ordering Initial Disclosures

Complete any fee information for “Required services that the originator selects” in the detail box. When completed, click the “OK” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

- Order Information
- Lender Information
- Property Information
- Borrower(s)
- Initial Disclosure Matrix
- Document Selection
- Document Custom Fields
- Loan Information
- Loan Detail
- Federal Box Disclosure
- Document Preparation Fee
- Escrow Information
- GFE Information

Footnote

Important Dates

1. Interest Rate for this GFE is available through	09/11/2011
2. Estimate for settlement charges is available through	08/25/2011
3. Must go to settlement within (rate lock period)	0 days
4. Number of	

Required services that the originator selects

Your Adjusted	Fee Description	Borr \$	PTC	Sec32	HC	FNMA
1. Our origina	Appraisal fee	300.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Charge/cre	Credit report	25.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
A: Adjusted C	Tax service		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Your Charg	Flood certification	12.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Required s	Mortgage insurance premium		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Title serv			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5. Owner's tit			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* <input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6. Required s			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7. Governme			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8. Transfer ta			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9. Initial deposit for escrow account					6,472.75	<input type="checkbox"/>
Includes: <input type="checkbox"/> All taxes <input type="checkbox"/> All insurance <input type="checkbox"/>						
10. Daily interest charges					59.33	<input type="checkbox"/>
11. Homeowner's insurance	Details					<input type="checkbox"/>
B: Charges for All Other Settlement Services					7,989.08	<input type="checkbox"/>
A+B: Total Estimated Settlement Charges					10,864.08	<input type="checkbox"/>
Complete the Tradeoff Table on the GFE? (optional)					No	<input type="checkbox"/>

OK

Save Close

Last revised: Jul 30, 2012

Ordering Initial Disclosures

Complete the fee information for “Title services and Lender title insurance” in the details box. When completed, click the “OK” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

- Order Information
- Lender Information
- Property Information
- Borrower(s)
- Initial Disclosure Matrix
- Document Selection
- Document Custom Fields
- Loan Information
- Loan Detail
- Federal Box Disclosure
- Document Preparation Fee
- Escrow Information
- GFE Information

Footnote

Important Dates

1. Interest Rate for this GFE is available through	09/11/2011
2. Estimate for settlement charges is available through	08/25/2011
3. Must go to settlement within (rate lock period)	0 days
4. Number of	

Title services and Lenders title insurance

Your Adjusted	Fee Description	Borr \$	PTC	Sec32	HC	FNMA
1. Our original	Settlement or closing fee	250.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Charge/credit	Lender's title insurance	750.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A: Adjusted Charges	Abstract or title search		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Your Charges	Title examination		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Required services	Document preparation		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Title services	Notary fees	20.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Owner's title	Attorney's fee		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
* <input type="checkbox"/>	Title escrow fee	55.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Required services	Title courier fee/Express mail fee	45.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Government						
8. Transfer tax						
9. Initial deposit for escrow account				6,472.75		
Includes: <input type="checkbox"/> All taxes <input type="checkbox"/> All insurance						
10. Daily interest charges				59.33		
11. Homeowner's insurance	Details					
B: Charges for All Other Settlement Services				7,989.08		
A+B: Total Estimated Settlement Charges				10,864.08		
Complete the Tradeoff Table on the GFE? (optional)				No		

OK

Save Close

Last revised: Jul 30, 2012

Ordering Initial Disclosures

Complete the fee information for “Required service that Borrower can shop for” in the corresponding details box. When completed, click the “OK” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Order Information
Lender Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Document Custom Fields
Loan Information
Loan Detail
Federal Box Disclosure
Document Preparation Fee
Escrow Information
GFE Information

Footnote

Important Dates

1. Interest Rate for this GFE is available through	09/11/2011
2. Estimate for settlement charges is available through	08/25/2011
3. Must go to settlement within (rate lock period)	0 days
4. Number of	

Required services that Borrower can shop for

Fee Description	Borr \$	PFC	Sec32	HC	FNMA
1. Our original Pest Inspection	100.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2. Charge/credit		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A: Adjusted Charges		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Your Charges		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3. Required services		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4. Title services		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Owner's title		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* <input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Required services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Government		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Transfer tax		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Initial deposit for escrow account				6,472.75	
Includes: <input type="checkbox"/> All taxes <input type="checkbox"/> All insurance <input type="checkbox"/>					
10. Daily interest charges				59.33	
11. Homeowner's insurance					
B: Charges for All Other Settlement Services				7,989.08	
A+B: Total Estimated Settlement Charges				10,864.08	
Complete the Tradeoff Table on the GFE? (optional)				No	

Save Close

OK

Ordering Initial Disclosures

Then complete the “Owner’s title insurance” and “Government recording charges” amounts. The “Initial deposit for escrow account” and “Daily interest charges” are automatically calculated and entered for you. Please do not change these unless you are absolutely sure. When completed, click the “Next” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

Order Information
Lender Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Document Custom Fields
Loan Information
Loan Detail
Federal Box Disclosure
Document Preparation Fee
Escrow Information
GFE Information

Footnote

Important Dates	
1. Interest Rate for this GFE is available through	09/11/2011
2. Estimate for settlement charges is available through	08/25/2011
3. Must go to settlement within (rate lock period)	0 days
4. Number of days to lock interest rate before settlement	0 days
Your Adjusted Origination Charges	
1. Our origination charge	2,875.00
2. Charge/credit for specific rate	
A: Adjusted Origination Charge	2,875.00
Your Charges for All Other Settlement Services	
3. Required services that the originator selects	337.00
4. Title services and lender's title insurance	1,120.00
5. Owner's title insurance*	1,222.00
* <input checked="" type="checkbox"/> Include footnote to borrower? * Paid by seller per the sales contract	
6. Required services that borrower can shop for	100.00
7. Government recording charges	125.00
8. Transfer taxes	
9. Initial deposit for escrow account	6,472.75
Includes: <input type="checkbox"/> All taxes <input type="checkbox"/> All insurance	
10. Daily interest charges	59.33
11. Homeowner's insurance	
B: Charges for All Other Settlement Services	9,436.08
A+B: Total Estimated Settlement Charges	12,311.08
Complete the Tradeoff Table on the GFE? (optional)	No

Save Close

Ordering Initial Disclosures

If there are other charges or credits, such as earnest money or seller contributions, enter it in the appropriate sections provided. This will provide a document that accurately tells the Borrower what they need to bring to closing. When completed, click the “Next” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

- Order Information
- Lender Information
- Property Information
- Borrower(s)
- Initial Disclosure Matrix
- Document Selection
- Document Custom Fields
- Loan Information
- Loan Detail
- Federal Box Disclosure
- Document Preparation Fee
- Escrow Information
- GFE Information
- Estimated Cash Due at Closing

Estimated Cash Due at Closing

Estimated Amount Due at Closing		
Charges	Amount	Line #
Purchase price	225,000.00	101
+ Closing costs (per GFE)	12,311.08	GFE A+B
+ City/town taxes		106
+ County taxes		107
+ Assessments		108
+		104
+		105
+		109
+		110
+		111
+		112
Less..	Amount	Line #
- New loan amount	175,000.00	202
- Deposit or earnest money	0.00	201
-		204
-		205
- Deposit with lender		206
-	0.00	207
-		208
-		209
- Amount paid outside of closing		
Cash due at closing	62,311.08	

Save Close

Last revised: Jul 30, 2012

Ordering Initial Disclosures

You will need to complete the service provider information for each item required. You can use the **address book** to select previously entered provider information.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC...B84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Order Information
Lender Information
Property Information
Borrower(s)
Initial Disclosure Matrix
Document Selection
Document Custom Fields
Loan Information
Loan Detail
Federal Box Disclosure
Document Preparation Fee
Escrow Information
GFE Information
Estimated Cash Due at Closing
Provider Information

Save Close

Provider Information

Provider for Title services and lender's title insurance

Provider Name	US Title Services
Address 1	123 Independence Ave.
Address 2	
ZIP: City, State	76133 Fort Worth TX
Phone	(888) 555-1212 Ext
Fax	
Contact	
E-mail	
Website	

Provider for Owner's title insurance

Provider Name	US Title Services
Address 1	123 Independence Ave.
Address 2	
ZIP: City, State	76133 Fort Worth TX
Phone	(888) 555-1212 Ext
Fax	
Contact	
E-mail	
Website	

Provider for Pest Inspection

Provider Name	ACME Pest Inspections
Address 1	1322 Bugger Lane
Address 2	

Identified Settlement Service Providers

Loan originator must provide contact information for at least one title insurance service provider, even if a sales contract indicates a different title insurance service provider.

Title services and lender's title insurance
US Title Services
123 Independence Ave.
Fort Worth, TX 76133
Phone: (888) 555-1212

Owner's title insurance
US Title Services
123 Independence Ave.
Fort Worth, TX 76133
Phone: (888) 555-1212

Pest Inspection
ACME Pest Inspections
1322 Bugger Lane
Arlington, TX 76012

Ordering Initial Disclosures

Select the provider you wish to include in your list and click **“Accept”**. When completed for each required provider, click the **“Next”** button.

The screenshot shows the PPDocs Loan Documentation Order Form Version 3.0. The browser address bar displays the URL: <https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2>. The borrower information is Daniel Boone, Property: 3018 Edgewater Dr, Loan Number: 123456789.

The interface includes a navigation menu on the left with options like Back and Next. A 'Provider Information' dialog box is open, showing a 'Pick Contact' window. The 'Pick Contact' window displays a list of providers, with 'US Title Services' selected. The contact information for 'US Title Services' is: 123 Independence Ave., Fort Worth, TX 76133, (888) 555-1212. A green arrow points to the 'Accept' button at the bottom of the dialog box.

The main form shows the following provider information:

Provider Information	
Provider Name	U
Address 1	1
Address 2	
ZIP: City, State	7
Phone	(8
Fax	
Contact	
E-mail	
Website	
Provider for Own	
Provider Name	U
Address 1	1
Address 2	
ZIP: City, State	7
Phone	(8
Fax	
Contact	
E-mail	
Website	
Provider for Pest	
Provider Name	ACME Pest Inspections
Address 1	1322 Bugger Lane
Address 2	

Ordering Initial Disclosures

Here we are showing our calculations. Click on each tab to display the information within. If the information doesn't look correct, make sure you have entered in all the correct amounts on the "Loan Detail" screen and the "GFE Information" screen. When completed, click the "Next" button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

Federal TIL Disclosure

Annual Percentage Rate	Finance Charge	Amount Financed	Total of Payments	Total Sale Price
4.4023%	\$ 63,276.33	\$ 171,703.67	\$ 234,980.00	\$ 0.00

Payment Schedule
179 monthly payments of \$1,305.44 beginning October 1, 2011
1 monthly payment of \$1,306.24 due on September 1, 2026

↓ ↓ ↓ ↓

Finance Charge Summary | Payment Analysis | Amort Schedule | Worst Case Analysis | Worst Case Schedule

Flood certification	12.00
Daily interest charges	59.33
Settlement or closing fee	250.00
Loan origination fee	2,250.00
Underwriting fee	125.00
Processing fee	100.00
Application fee	25.00
Review fee	25.00
Closing fee	200.00
Attorney fee for docprep	150.00
Title escrow fee	55.00
Title courier fee/Express mail fee	45.00
Total Prepaid Finance Charges:	3,296.33
Plus Interest for Life of Loan	59,980.00
FINANCE CHARGE:	63,276.33

Save | Close

Ordering Initial Disclosures

You will now be presented with your audit results. There are two audit warnings. Stop Audits, which won't allow you to continue until something has been fixed, and Warning Audits, that are telling you about something unusual, but you can acknowledge by clicking on the box to the left. When provided, click on the "more..." link to read more information about the audit, or click on the "go to" link to be taken to the screen to where you can make the appropriate correction. When all items have been acknowledged or cleared, click the "Next" button to continue.

The screenshot displays the 'Initial Disclosures - Federal' web application. The browser title is 'PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog'. The URL is 'https://www.ppdocs.com/online/site/weborder/OrderForm3.aspx?LoanGuid=DF35C34BB8A44C61A855FF33DEC2CC9'. The user is identified as Daniel Boone, with property address 1234 Riverside Drive and loan number 12345.

The sidebar on the left contains the following navigation items: Order Information, Lender Information, Document Selection, Document Custom Fields, Loan Information, Loan Detail, Federal Box Disclosure, Document Preparation Fee, Escrow Information, GFE Information, Estimated Cash Due at Closing, Provider Information, Transmittal Letter, ECOA Notice, Federal TIL Disclosure, Auditor, and Submit Request. The 'Auditor' item is currently selected.

The main content area is titled 'Auditor' and contains an 'Audit Result' section. It lists two warning messages, each with a checkbox and a 'more...' link:

- Please make sure to adjust our attorney fee if you will want a Warranty Deed prepared or reviewed. [more...] [go to]
Acknowledged by Carrie Test on 7/20/2012 3:38:33 PM
- Some documents in your document selection contain custom fields. Please be sure you have completed the form specific information, as needed. [more...] [go to]
Acknowledged by Carrie Test on 7/20/2012 3:38:34 PM

Below the warnings, two audit results are shown with green checkmarks:

- Section 35 Audit PASSED
- State High Cost Analysis PASSED

The 'Other Information' section contains two informational messages:

- Want to HIDE ORDER FORMS that you never use? [more...]
- You can now use your initial disclosures data to order final documents without "cloning". [more...]

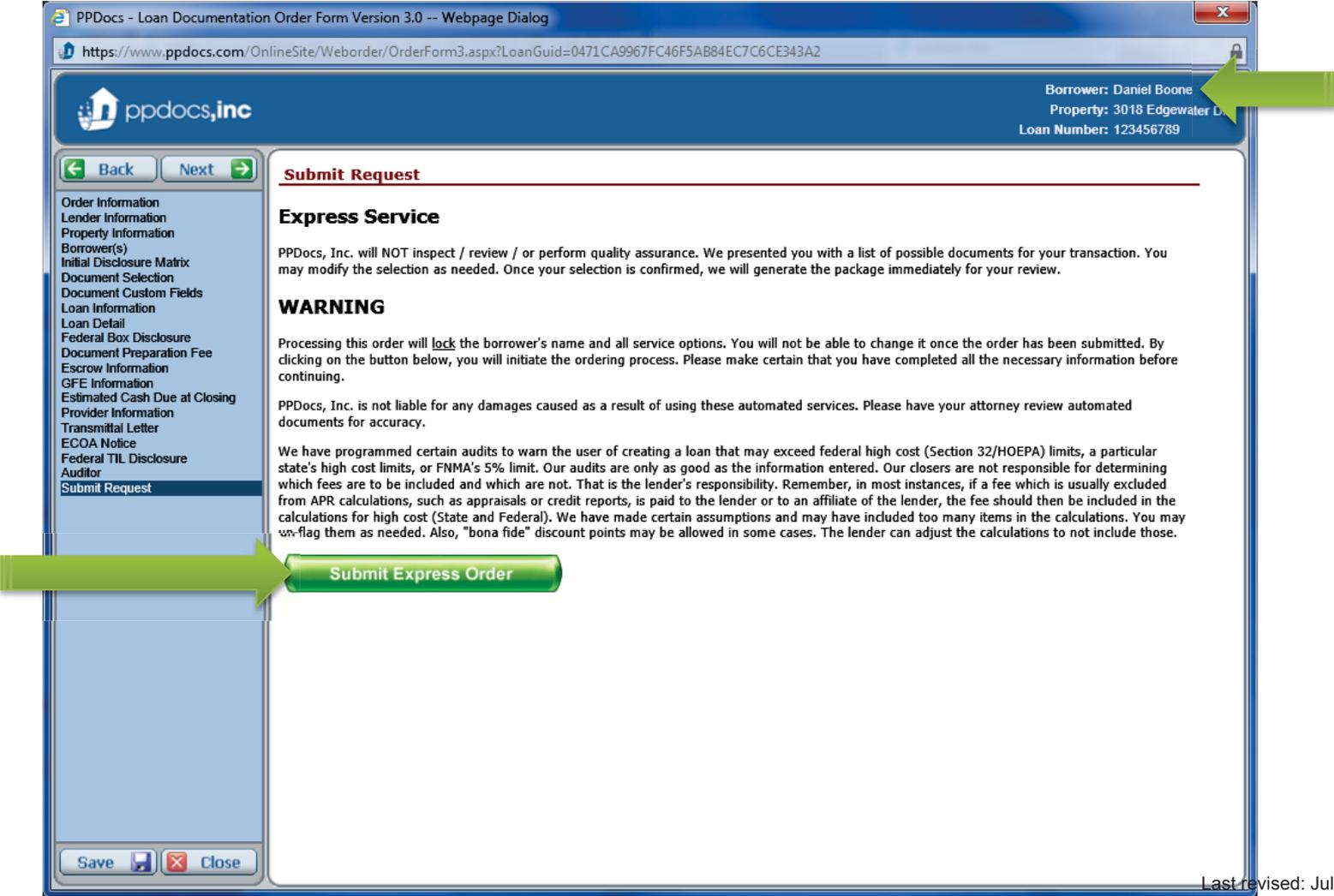
A 'Please Note' section at the bottom states: 'We audit all loans for federal high cost (Section 32 -HOEPA) compliance. We expand that audit to run on purchase transactions even though those transactions are not now covered by federal high cost (Section 32 -HOEPA) regulations. We do not check loans for compliance for other state or other local predatory lending laws. Be certain you know the laws of the state in which you are lending.'

At the bottom left, there is a yellow box with the text: 'Our audit platform is designed to keep you from making mistakes. Red X audits are stop audits and you cannot continue until they are cleared. Orange audits are warnings that you may acknowledge. Be'. Below this box are 'Save' and 'Close' buttons.

At the bottom right, there is a 'Next' button with a right-pointing arrow. Green arrows in the image point to this button, the 'Auditor' section header, and the two warning messages.

Ordering Initial Disclosures

Once you have cleared or acknowledged all of your audits, you are now ready to submit the order. Simply click the green “Submit Express Order” button. Make sure that the borrower’s name is spelled correctly before doing so. We lock the name once submitted and it cannot be changed.



Ordering Initial Disclosures

You will watch as the data is calculated and merged into the documents. It will take about a second per document being produced.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2>. The page header includes the PPDocs, Inc. logo and borrower information: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, Loan Number: 123456789. A navigation menu on the left lists various sections, with "Submit Request" highlighted. The main content area is titled "Submit Request" and displays a progress indicator with 11 steps, where the 11th step is active. A central message reads "Please wait while we process your order...". A detailed log of processing steps is shown in a box:

```
Looking for server...
Capturing Transmittal Letter to Applicant with Receipt
(Custom) |1|19
Capturing Good Faith Estimate (GFE) |2|19
Capturing Acknowledgement of Receipt of Good Faith Estimate
(GFE) |3|19
Capturing Identified Settlement Service Providers (RESPA
2010) |4|19
Capturing Notice of Intent to Proceed w/ Loan Application
(RESPA 2010) |5|19
Capturing Aggregate Escrow Account Entry|6|19
Capturing Initial Escrow Disclosure|7|19
Capturing TIL Disclosure|8|19
Capturing APR & Finance Charge Summary|9|19
Capturing Itemization of Amount Financed|10|19
Capturing Discl.- Right to Receive Appraisal (Application
Date)ECO|11|19
```

At the bottom of the window, there are "Save" and "Close" buttons.

Ordering Initial Disclosures

Once complete, you can click on the “Download package” icon to view and print your documents.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2>. The page header includes the PPDocs logo and the borrower information: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, Loan Number: 123456789.

The main content area is titled "Submit Request" and contains the following sections:

- Package Information**

Borrower:	Daniel Boone
Property:	3018 Edgewater Dr, TX
Lender:	Lone Star Republic Bank
Loan Number:	123456789
Created:	8/11/2011 4:19:11 PM
Size:	524 KB
- Download package**: A green arrow points to a red download icon with the text "Download package".
- Snail Mail Disclosures**

As an added service to our clients, we are happy to print and mail the disclosures including the settlement cost booklet and the CHARM booklet (if necessary) to the applicant free of charge. Please verify that these documents are correct before submitting a mail request. The cut-off time for same day mail out is 11:00 a.m. CST.
- eDisclosures (ESIGN/UETA Compliant)**

As an added service to our clients, we are happy to electronically send the disclosures to the borrower. Please verify that these documents are correct before submitting an electronic delivery request. This is a free service.

Note: This is NOT email delivery. This method is compliant with ESIGN Act and UETA requirements.
- E-mail Package (NOT ESIGN/UETA Compliant)**

Note: This method does NOT comply with ESIGN/UETA. Do NOT solely use this method to send to Borrower.

Sender's

At the bottom of the page, there are "Save" and "Close" buttons.

Ordering Initial Disclosures

Your document package is in a PDF format and you will need a PDF viewer installed on your machine. Most machines already have “**Adobe Reader**” installed, so this should not be an issue. We also bookmark each document for easy navigation through the package. Click on the document name on the left to be taken directly to the first page of that document. You can Save or Print your documents using the button at the top.

The screenshot shows the Adobe Acrobat Pro interface. The top menu bar includes File, Edit, View, Window, and Help. The toolbar contains various icons for file operations. The left sidebar shows a 'Bookmarks' panel with a list of document pages. The main content area displays a 'Good Faith Estimate (GFE)' form from the U.S. Department of Housing and Urban Development.

Bookmarks List:

- 6200: Transmittal Letter to Applicant with Receipt
- 1219: Good Faith Estimate**
- 2104: Acknowledgement of Receipt of Good Faith Estimate
- 3574: Identified Settlement Service Providers
- 3767: Notice of Intent to Proceed with Loan Application
- 5907: Aggregate Escrow Account Entry
- 5906: Initial Escrow Disclosure
- 7022: Truth in Lending Disclosure Statement
- 5905: APR & Finance Charge Summary
- 4013: Itemization of Amount Financed
- 1115: Disclosure of Right to Receive a Copy of an Appraisal
- 3464: Equal Credit Opportunity Act Notice
- 4195: Estimated Cash Required from Borrower at Closing

Good Faith Estimate (GFE) Form:

OMB Approval No. 2502-0265

Name of Originator: Lone Star Republic Bank	Borrower: Daniel Boone and Janet Boone
Originator Address: 1 Victory Boulevard, 100 Austin, TX 78701	Property Address: 3018 Edgewater Dr Austin, TX 78733
Originator Phone Number: (512) 234-5678	Date of GFE: August 11, 2011
Originator Email: sam.houston@lspdocs.com	

Purpose: This GFE gives you an estimate of your settlement charges and loan terms if you are approved for this loan. For more information, see HUD's *Special Information Booklet* on settlement charges, your *Truth-in-Lending Disclosures*, and other consumer information at www.hud.gov/respa. If you decide you would like to proceed with this loan, contact us.

Shopping for your loan: Only you can shop for the best loan for you. Compare this GFE with other loan offers, so you can find the best loan. Use the shopping chart on page 3 to compare all the offers you receive.

Important dates:

- The Interest rate for this GFE is available through **09/11/2011**. After this time, the interest rate, some of your loan Origination Charges, and the monthly payment shown below can change until you lock your interest rate.
- This estimate for all other settlement charges is available through **09/25/2011**.
- After you lock your interest rate, you must go to settlement within **N/A** days (your rate lock period) to receive the locked interest rate.
- You must lock the interest rate at least **N/A** days before settlement.

Summary of your loan:

Your initial loan amount is	\$ 175,000.00
Your loan term is	15 years
Your initial interest rate is	4.125 %
Your initial monthly amount owed for principal, interest, and any mortgage insurance is	\$ 1,305.44 per month
Can your interest rate rise?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes, it can rise to a maximum of % . The first change will be in .
Even if you make payments on time, can your loan balance rise?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes, it can rise to a maximum of
Even if you make payments on time, can your monthly amount owed for principal, interest, and any mortgage insurance rise?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes, the first increase can be in and the monthly amount owed can rise to \$. The maximum it can ever rise to is \$
Does your loan have a prepayment penalty?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes, your maximum prepayment penalty is \$
Does your loan have a balloon payment?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes, you have a balloon payment of \$ due in years.

Ordering Initial Disclosures

If you need to make corrections, jump back to the appropriate screen, and make the change. You will need to resubmit to get corrected documents. If the documents are fine, you can use any of the delivery options below. Read the descriptions and select the method you prefer. Click on the “Close” button when you are finished.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/Weborder/OrderForm3.aspx?LoanGuid=0471CA9967FC46F5AB84EC7C6CE343A2

ppdocs,inc

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Submit Request

Package Information

Borrower:	Daniel Boone
Property:	3018 Edgewater Dr, TX
Lender:	Lone Star Republic Bank
Loan Number:	123456789
Created:	8/11/2011 4:19:11 PM
Size:	524 KB

 **Download package**

Snail Mail Disclosures

As an added service to our clients, we are happy to print and mail the disclosures including the settlement cost booklet and the CHARM booklet (if necessary) to the applicant free of charge. Please verify that these documents are correct before submitting a mail request. The cut-off time for same day mail out is 11:00 a.m. CST.

eDisclosures (ESIGN/UETA Compliant)

As an added service to our clients, we are happy to electronically send the disclosures to the borrower. Please verify that these documents are correct before submitting an electronic delivery request. This is a free service.
Note: This is NOT email delivery. This method is compliant with ESIGN Act and UETA requirements.

E-mail Package (NOT ESIGN/UETA Compliant)

Note: This method does NOT comply with ESIGN/UETA. Do NOT solely use this method to send to Borrower.

Sender's

Save Close

Ordering Initial Disclosures

You can always view, print, and deliver any package produced for a transaction by going to the “**Packages**” section of the order information screen after a package has been produced.

Borrower:	Daniel Boone
Property:	1234 Riverside Drive, TX
Lender:	ABC Mortgage Company
Loan Number:	12345
Last Modified:	7/20/2012 3:47:32 PM
Profile:	Default
Template:	
Import:	

Selected Product

Initial Disclosures - Federal

Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, state specific disclosures (some Texas disclosures are available).

Service type: Express
Fee: \$10.00

- Open Order Form >
- Order Final Docs >
- Import Data >
- Export Data >
- View Data >
- Print Summaries >
- Clone Order >
- Create Template >
- Send Copy >
- Archive Order >
- Fax Cover Sheet >

Order Status

Order Number:	201207200192 (Cancel Order...)
Time Received:	7/20/2012 3:45:58 PM
Time Needed:	7/20/2012 3:45:58 PM
Status:	Released
Operator:	merlin

Packages

Package	Size	Deliveries	Pages	Date
Package	2,097 KB	0	31	7/20/2012 3:46:23 PM



Ordering Closing Documents

When ready to order closing documents for a transaction you already prepared the initial disclosures for, start by clicking on the borrower's name for the initial disclosures order. You can also order closing documents without first having ordered the initial disclosures. Simple click on the "New Order" button at the top of the Casefile Manager screen to begin an order that way.

Home > Account > Case File Manager

CASE FILE MANAGER

NEW ORDER **SEARCH ORDERS** **ARCHIVE SELECTED**

Borrower / Property	Loan No.	Product	Modified	<input type="checkbox"/>
Daniel Boone 1234 Riverside Drive	12345	Initial Disclosures - Federal Express-Initial Disclosures - RESPA Order Number: 201207200192	3:47:32 PM	<input type="checkbox"/>

Ordering Closing Documents

To start a new order for closing documents using the data from the initial disclosure order, click on the “Order Final Docs” button.

The screenshot shows the ppdocs,inc website interface. At the top, there is a navigation bar with links for 'Download Documents', 'Logout', and a search box. Below the navigation bar is a header with links for 'Home', 'Services', 'Resources', 'FAQ', 'News', 'Contact', and 'Account'. The main content area is titled 'Order Status' and contains two main sections: 'Loan Information' and 'Selected Product'.

Loan Information

Borrower:	Daniel Boone
Property:	1234 Riverside Drive, TX
Lender:	ABC Mortgage Company
Loan Number:	12345
Last Modified:	7/20/2012 3:47:32 PM
Profile:	Default
Template:	
Import:	

Selected Product

Initial Disclosures - Federal
Initial Loan Disclosures required by TILA, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, and specific disclosures (some Texas disclosures are available).

Service type: Express
Fee: \$10.00

A green arrow points to the 'Order Final Docs' button in the following row of buttons:

Open Order Form >	Order Final Docs >	Import Data >	Export Data >	View Data >
Print Summaries >	Clone Order >	Create Template >	Send Copy >	Archive Order >
Fax Cover Sheet >				

Ordering Closing Documents

Go ahead and click the “OK” button.

The screenshot shows the ppdocs,inc website interface. At the top, there is a navigation bar with links for Home, Services, Resources, FAQ, News, Contact, and Account. Below the navigation bar is a banner image of a person in a suit reviewing documents. The main content area shows the breadcrumb path: Home > Account > Case File Manager > Order Status. A section titled 'Loan Information' contains a table with the following data:

Borrower:	Daniel Boone
Property:	1234 Riverside Drive, TX
Lender:	ABC Mortgage Company
Loan Number:	12345
Last Modified:	7/20/2012 3:47:32 PM
Profile:	Default
Template:	
Import:	

Below the table is a section titled 'Ready to Order Final Closing Documents?'. It contains the text: 'If so, we can create a new order using the data from these initial disclosures. You will have an opportunity to pick a template and profile, while retaining the data you've already input.' At the bottom of this section are two buttons: 'OK >' and 'Cancel'. A green arrow points to the 'OK >' button.

Ordering Closing Documents

Make sure the product type defaulted is what you actually want to order. We made that assumption off the information in the initial disclosure order form is correct and you are still ordering the same closing product.

ppdocs,inc

Download Documents Logout Search...

Home Services Resources FAQ News Contact Account

Home > Account > Case File Manager > Order Status

Loan Information

Borrower:	Daniel Boone
Property:	1234 Riverside Drive, TX
Lender:	ABC Mortgage Company
Loan Number:	12345
Last Modified:	7/20/2012 4:12:13 PM
Profile:	Default
Template:	
Import:	InitialTIL

Selected Product

Residential Mortgage ([Change product...](#))
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: \$150.00

[Open Order Form](#) > [Import Data](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) >
[Clone Order](#) > [Create Template](#) > [Send Copy](#) > [Archive Order](#) >

Ordering Closing Documents

Again, a quick overview of the order form. To navigate through the screens you will use the “Back” and “Next” button. Fields with a yellow background are required fields and you will not be able to continue unless they have some valid data inside of them. Fields with a green border will generally have a “F2” function. For instance, when you enter the zip code, hit the “F2” key on your keyboard to complete the city, state, and county. Also, use the “address book” to quickly complete information if you have entered it in the order form in the past. Complete the required fields, as needed. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

Order Information

Order Prepared by	David Crockett
Phone Number	(512) 234-5678 Ext
E-mail	davidc@loanstarpublicbank.com
Loan #	123456789
Investor Loan Number	12133222
MERS OrgID	1000000
MERS Number	1000000-0123456789-5
Property State	TX
Attorney fee	collected at closing and disbursed by settlement agent.
Barcode Reference	Loan #
Barcode Type	Code 128
Fulfillment services?	Yes, please. An additional fee to PPDocs, Inc. will apply. <i>Must be setup in advance. Contact Jaime Dusten at 800.800.9975 for more information.</i>

Save Close

Ordering Closing Documents

We default the Show Lender Information, Lender Profile, and Federal Box Disclosure screens to “no” to save time since these screens rarely change. However, if this is your first order, we recommend changing to “yes” so you can check the screens for accuracy.

Order Information

Order Prepared by: ABC Mortgage Company

Phone Number: (972) 814-1528 Ext:

E-mail: carrie@ppdocs.com

Loan #:

Investor Loan Number:

Attorney Invoice Number:

MERS OrgID:

MERS Number:

Property State: TX

Attorney fee: paid monthly by account holder

Barcode Reference:

Fulfillment services?: No, thank you.

Show Lender Information? Yes

Show Lender Profile? Yes

Show Federal Box Disclosure? Yes

The order information screen contains information about the orderer of the loan and fields that may be different for individual orders, such as loan number.

Save Close

Ordering Closing Documents

If you have used the data from the initial disclosures, then there really shouldn't be that much information you need to complete. So you should just be able to continue through most screens without any data entry. Unless, of course, something changed in the interim. Click the "Next" button to continue to the next screen.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The URL is "https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68". The page header includes the PPDocs,inc logo and "order instructions". On the right, it displays: "Borrower: Daniel Boone", "Property: 3018 Edgewater Dr", and "Loan Number: 123456789".

A green arrow points to a "Next" button with a right-pointing arrow. Below the button is a sidebar with "Order Information" and "Lender Information" tabs. The main content area is titled "Lender Information" and contains the following fields:

- Name: Lone Star Republic Bank
- Address 1: 1 Victory Boulevard
- Address 2: 100
- ZIP: City, State: 78701 Austin TX
- Entity type: state bank
- Exist under: TX law.
- Phone: (512) 234-5678 Ext: []
- Fax: (512) 234-8765
- Contact: Samuel Houston
- Times: []
- Days: []
- E-mail: sam.houston@ppdocs.com
- Tax ID number: []

Below the Lender Information section is a "Signature Block For Signing Assignments And Endorsing Notes - Click To Edit" with a signature line for "Lone Star Republic Bank" and a "By:" label.

The "Broker Information" section contains the following fields:

- Company: []
- Address 1: []
- Address 2: []
- ZIP: City, State: [] [] []
- Phone: [] Ext: []

At the bottom left, there are "Save" and "Close" buttons. At the bottom right, the text "Last revised: Jul 30, 2012" is visible.

Ordering Closing Documents

You shouldn't need to change this information, but we make it available *just* in case. Click the "Next" button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Order Information
Lender Information
Lender Profile

Lender Profile

Mortgage / Deed of Trust Information

Company: Lone Star Republic Bank
Address 1: 1 Victory Boulevard
Address 2: 100
ZIP: City, State: 78701 Austin TX

Trustee Information

Company: Michael H. Patterson
Address 1: 2310 Interstate 20 W
Address 2: Suite 100
ZIP: City, State: 76017 Arlington TX
County: Tarrant
Phone: (817) 461-5500 Ext:

Funder Information

Name: Lone Star Republic Bank
Address 1: 1 Victory Boulevard
Address 2: 100
ZIP: City, State: 78701 Austin TX
Phone: (512) 234-5678 Ext:
Fax: (512) 234-8765
E-mail: sam.houston@ppdocs.com
Contact between: 9:00 am - 5:00 pm
and: Monday - Friday (excluding Federal Holidays)

Save Close

First Payment Letter Information

Ordering Closing Documents

Complete the Settlement Agent/Title Company information. If you have input the information on a previous order, click on the address book icon and select from previous entries. Click the “Next” button to continue to the next screen.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68>. The page header includes the PPDocs,inc logo and "order instructions". In the top right corner, borrower and property information is displayed: "Borrower: Daniel Boone", "Property: 3018 Edgewater Dr", and "Loan Number: 123456789".

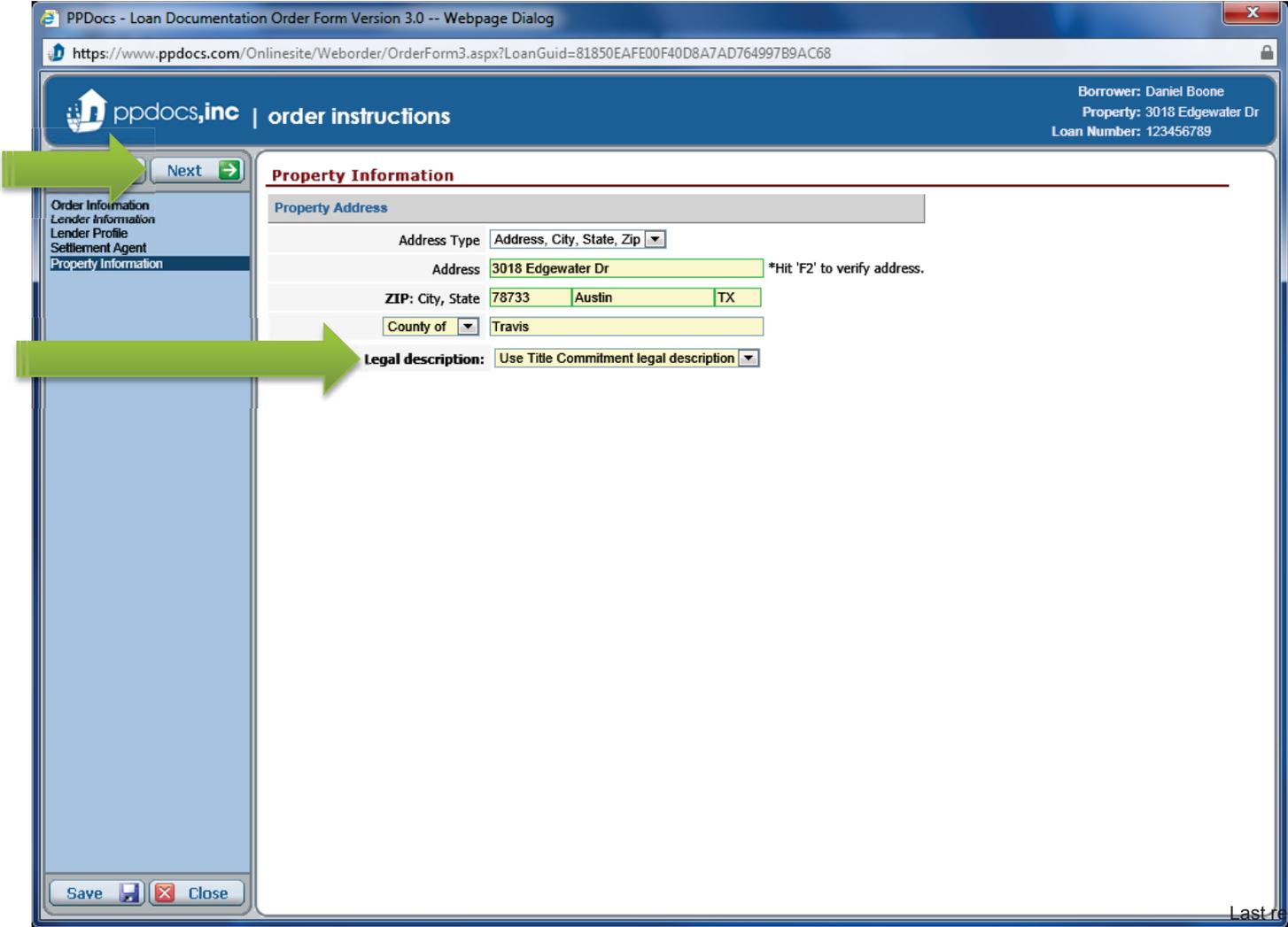
The main content area is titled "Settlement Agent" and contains a form for "Settlement Agent / Title Company" information. The form fields are as follows:

Company	Alamo Title Company	
Address line 1	901 S MO Pac Expy	
Address line 2	Suite 100 Bldg III	
ZIP: City, State	78746-5776 Austin	TX
County	Travis	
Phone number	(512) 329-0777	Ext <input type="text"/>
Fax number	(512) 329-0780	
Contact	Melynda Lattimore	
E-mail address	Melynda.Lattimore@alamotitle-austin.com	
GF number	523132	

On the left side of the form, there is a navigation menu with the following items: "Order Information", "Lender information", "Lender Profile", and "Settlement Agent". A "Next" button with a right-pointing arrow is located above the menu. At the bottom of the window, there are "Save" and "Close" buttons. Two green arrows are overlaid on the image: one points to the "Next" button, and the other points to the address book icon in the Company field.

Ordering Closing Documents

The property information shouldn't change, but we would like to know which legal description you prefer for us to use. The title commitments or the surveys? Click the "Next" button to continue to the next screen.



Ordering Closing Documents

Some additional borrower information may be needed, such as, marital status and gender. Add any AKA's to the name affidavit field separated by a comma. Click the "Next" button to continue to the next screen.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The URL is "https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68". The page header includes the PPDocs,inc logo and "order instructions". In the top right corner, it displays: "Borrower: Daniel Boone", "Property: 3018 Edgewater Dr", and "Loan Number: 123456789".

On the left side, there is a navigation menu with the following items: "Order Information", "Lender Information", "Settlement Agent", "Property Information", and "Borrower(s)". A green arrow points to the "Next" button above this menu.

The main content area is titled "Borrower(s)" and contains two sections:

- Borrower #1 Information**
 - Borrower Designation: Individual (dropdown)
 - Individual Information
 - First name: Daniel
 - Middle name: (empty)
 - Last name: Boone
 - Suffix: (empty)
 - Marital Status: Married (dropdown)
 - Gender: Male (dropdown)
 - Power of Attorney: (checkbox, unchecked)
 - Name Affidavits: (text input)
 - Mailing address: 3018 Edgewater Dr
 - ZIP: City, State: 78733 Austin TX
 - Signature Block - Click To Edit
 - Daniel Boone
 - Add 2nd Borrower
- Borrower #2 Information**
 - Borrower Designation: Individual (dropdown)
 - Individual Information
 - First name: Janet
 - Middle name: (empty)
 - Last name: Boone
 - Suffix: (empty)

At the bottom left, there are "Save" and "Close" buttons. A green arrow points to the "Add 2nd Borrower" checkbox, and another green arrow points to the "Name Affidavits" field.

Ordering Closing Documents

There are usually a few new drop down questions that need to be completed on the Loan Information screen. Complete those as necessary. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

Loan Information

Lien position First Lien Subordinate Lien

Is there a second lien? No Yes

Loan Type Conventional

Loan Purpose Purchase

Interest Rate Fixed Adjustable

Investor None - Not applicable

Loan Plan Fannie Mae / FNMA 3200 Fixed-Rate Note

Occupancy type Primary Residence

Flood No Flood

Assistance Federal Disaster Relief NOT Available

Survey New

Appraisal New

Appraisal Receipt Borrower is receiving appraisal 3 days prior to closing.

Mortgage Insurance (PMI)? No Yes

Buydown? No Yes

Negative Amortization? No Yes

VA Land Board? No Yes

Additional Collateral? No Yes

Save Close

Ordering Closing Documents

By the way. You may have noticed a new little thing at the top of the order form that says “Comments to PPDocs”. You will only see that on full service products. Basically, that is there so that you can write little notes or questions to our team as you complete the order form. Just make sure you click “Close” at the bottom when you are done.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The URL is "https://www.ppdocs.com/OnlineSite/OrderForm3.aspx?LoanGuid=9C5BF703845943478B5FC60114C6FEA9". The page header includes the PPDocs,inc logo, "Residential Mortgage", and "Comments to PPDocs". The borrower information is "Borrower: Carrie Test", "Property: asdf", and "Loan Number:". A "Next" button is highlighted with a green arrow. The "Loan Information" section contains radio buttons for "Lien position" (First Lien selected, Subordinate Lien) and "Is there a second lien?" (No selected, Yes). A dialog box titled "Leave Instructions | Comments | Notes:" is open, containing the text: "I am not too sure about the Flood Assistance question. Could you look at my flood certificate that I will upload after submitting the order?". A "Close" button is at the bottom of the dialog. A sidebar on the left lists navigation options, with "Loan Information" selected. At the bottom left, there is a "Save" button and a "Close" button. A yellow box at the bottom left contains the text: "The Loan Information screen allows you to specify the type of loan."

Ordering Closing Documents

Once again, if you ordered your initial disclosures from us, you shouldn't really have to change anything on this screen. You will notice that we have automatically included for you in their appropriate fields. Such as, the last disclosed APR. Click the "Next" button to continue to the next screen.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68>. The page header includes the PPDocs,inc logo and "order instructions". On the right side of the header, it displays: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, Loan Number: 123456789.

A sidebar on the left contains a menu with the following items: Order Information, Lender Information, Lender Profile, Settlement Agent, Property Information, Borrower(s), Loan Information, and Loan Detail. The "Next" button is highlighted with a green arrow pointing to it.

The main content area is titled "Loan Detail" and contains the following fields:

Appraised Value	250,000.00
Sales Price	225,000.00
Loan Payoff	0.00
Down Payment	50,000.00
Loan Amount	175,000.00
Loan to Value (LTV)	77.778 %
Application Date	06/13/2011
Interest Rate Lock Date	08/11/2011
Initial TIL Sent Date	08/12/2011
Last TIL Received Date	08/16/2011
Earliest Allowed Closing Date	08/20/2011 according to MDIA (read-only)
Closing Date	08/29/2011
Settlement or Funding Date	08/29/2011
Document Expiration Date	
Interest Rate Expiration Date	08/15/2011
First Payment Date	10/01/2011
Interest Rate	4.125 %
Last APR Disclosed	4.402 %
Payment Frequency	Monthly
Interest Only Term	0 months
P&I (Amort.) Term	180 months
Loan Term	180 months
P&I Payment Amount	1,305.44
Number of Days Per Year	365

At the bottom left of the form, there are buttons for "Save", "Close", and "Close". A green arrow points to the "Next" button, and another green arrow points to the "Last APR Disclosed" field.

Ordering Closing Documents

You shouldn't have to change anything on here, but just make sure that the answers are correct before continuing. Click the "Next" button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

Order Information
Lender Information
Lender Profile
Settlement Agent
Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure

Federal Box Disclosure

Is **Property Insurance** required to obtain credit? No. Yes.

Is **Flood Insurance** required to obtain credit? No. Yes.

Is there an **Itemization of Amount Financed** attached? No. Yes.

Does this loan have an **Interest Only Period**? No. Yes.

Will this loan have a **demand feature**? No. Yes.

Will there be a **required deposit**? No. Yes.

Is the **Lender the Seller**? No. Yes.

Is this loan **assumable**? No. Yes.

The estimated filing fee is

TIL Disclosure Estimates: [more](#)

Is the **Annual Percentage Rate (APR)** an estimate? No. Yes.

Is the **Finance Charge** amount an estimate? No. Yes.

Is the **Amount Financed** an estimate? No. Yes.

Is the **Total of Payments** amount an estimate? No. Yes.

Is the **Total Sales Price** amount an estimate? No. Yes.

Is the **Payment Schedule** an estimate? No. Yes.

Is the Filing Fee an estimates? No. Yes.

Are all numerical disclosures (except late payment) estimates? No. Yes.

Prepayment:

Will the Borrower possibly **have to pay a penalty**? No. Yes.

Will the Borrower be **entitled to a refund** of part of the finance charge? No. Yes.

Lender Offered/Solicited Insurance: (not common)

Does the Lender offer or solicit an insurance or annuity product? No. Yes.

Save Close

Ordering Closing Documents

Check the appropriate boxes. Some may display additional boxes for more information. We will enter the information if it is found on the survey or title commitment. If it is not, we will be contacting you for it. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/OnlineSite/WebOrder/OrderForm3.aspx?LoanGuid=9C5BF703845943478B5FC60114C6FEA9

ppdocs,inc Residential Mortgage

Borrower: Carrie Test
Property: asdf
Loan Number:

Next

Order Information
Lender Information

Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options

Escrow Information
HUD lines 100-600
HUD lines 700-800
HUD lines 900-1400
HUD vs GFE Tolerance Summary
Additional Docs & Conditions
Req / Corrections

Submit Request

Click this box if this loan has Mortgage Insurance.

Save Close

Security Instrument Options

Is part of loan for Owelty Lien? No Yes

Additional Riders:

- Mortgage Insurance Rider
- Balloon Rider (if refi option)
- Biweekly Payment Rider
- Graduated Payment Rider
- Rental Property
- Rate Improvement
- Second Home
- VA Loan
- PUD Rider
- Condo Rider

Condominium / PUD subdivision name

PUD Recording Data

- Manufactured Home
- Other attached rider(s)

Ordering Closing Documents

Complete the escrow information as needed. Enter in the number of payments per year, the payment due date, and the payment amount and we will calculate the breakdown along with the adjustment in the “**Aggregate Escrow Analysis Recap**” table at the bottom. When completed, click the “**Next**” button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
 https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
 Borrower: Daniel Boone
 Property: 3018 Edgewater Dr
 Loan Number: 123456789

Next →

Escrow Information
 Escrow type: Aggregate Escrow Analysis

Aggregate Escrow Analysis Setup

First Escrow Payment Date: 10/01/2011
 Cushions for MI: 0 (2 Max)
 Cushions for Other: 2 (2 Max)
 Other payment Description:
 Other payment Amount:

Lines 1002-1009		Payments per year	Payment due date	Payment amount
1002	Homeowner's insurance	1	10/01/2012	2,132.00
1003	Mortgage insurance	0		
1004	Property taxes	1	12/01/2011	7,255.00
1005		0		
1006		0		
1007		0		
1008		0		
1009		0		

Aggregate Escrow Analysis Recap

1000.	Description	Months	Amount per month	Total amount due
1002.	Homeowner's insurance	2	177.67	355.34
1003.	Mortgage insurance	0		
1004.	Property taxes	11	604.58	6,650.38
1005.		0		
1006.		0		
1007.	Aggregate Escrow Adjustment	0		-532.97

Save | Close

Ordering Closing Documents

Now we begin our version of the HUD-1. Since everything needs to be consistent we make the next few screens track the HUD-1 in look and feel. Go ahead and add any information you need in the 100-600 items on this screen. The totals will calculate automatically. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
 https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
 Borrower: Daniel Boone
 Property: 3018 Edgewater Dr
 Loan Number: 123456789

Next →

Order Information
 Lender Information
 Lender Profile
 Settlement Agent
 Property Information
 Borrower(s)
 Loan Information
 Loan Detail
 Federal Box Disclosure
 Security Instrument Options
 Escrow Information
HUD lines 100-600

HUD lines 100-600

100. Gross Amount Due from Borrower		400. Gross Amount Due to Seller	
101. Contract sales price	225,000.00	401. Contract sales price	225,000.00
102. Personal property		402. Personal property	
103. Settlement charges to borrower (line 1400)	12,311.08	403.	
104.		404.	
105.		405.	
Adjustments for items paid by seller in advance		Adjustments for items paid by seller in advance	
106. City/town taxes	to	406. City/town taxes	to
107. County taxes	to	407. County taxes	to
108. Assessments	to	408. Assessments	to
109.		409.	
110.		410.	
111.		411.	
112.		412.	
120. Gross Amount Due from Borrower	237,311.08	420. Gross Amount Due to Seller	225,000.00
200. Amounts Paid by or in Behalf of Borrower		500. Reductions In Amount Due to Seller	
201. Deposit of earnest money	2,000.00	501. Excess deposit (see instructions)	
202. Principal amount of new loan(s)	175,000.00	502. Settlement charges to seller (line 1400)	200.00
203. Existing loan(s) taken subject to		503. Existing loan(s) taken subject to	
204.		504. Payoff of first mortgage loan	
205.		505. Payoff of second mortgage loan	
206. Deposit with lender	0.00	506.	
207.	0.00	507.	
208.		508.	
209.		509.	
Adjustments for items unpaid by seller		Adjustments for items unpaid by seller	

Save [Icon] [X] Close

Ordering Closing Documents

Starting with the 800 items, you will notice that we have a GFE column next to Borrower and Seller columns. This lets us easily compare what was disclosed on the GFE with what will actually be on the HUD. Don't forget about the detail buttons for 801 and 802. Click the "Next" button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Next

Order Information
Lender Information
Lender Profile
Settlement Agent
Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options
Escrow Information
HUD lines 100-600
HUD lines 700-800

Save Close

HUD lines 700-800

700. Total Real Estate Broker Fees		GFE	Borrower	Seller		
Division of commission (line 700) as follows:						
701.	\$ to					
702.	\$ to					
703.	Commission paid at settlement to					
704.	to					
800. Items Payable In Connection with Loan		Line Amt	GFE	Borrower	Seller	POC
801.	Our origination charge	2,875.00	2,875.00	2,875.00		
802.	Charge/credit for specific rate					
803.	Adjusted origination charges		2,875.00	2,875.00		
804.	Appraisal fee	to	300.00	300.00		
805.	Credit report	to	25.00	25.00		
806.	Tax service	to				
807.	Flood certification	to	12.00	12.00		
808.	Document preparation	to PeirsonPatterson, LLP \$150.00 (inc				
809.	to					
810.	to					
811.	to					
812.	to					
813.	to					
814.	to					

Last revised: Jul 30, 2012

Ordering Closing Documents

This screen is for the 900-1400 items. Again, we have added the GFE column to allow for easy side-by-side comparison of disclosed fees and actual closing fees. Click the "Next" button to continue to the next screen.

Next

HUD lines 900-1400

900.	Items Required by Lender to Be Paid in Advance			GFE	Borrower	Sel
901.	Daily interest charges from 08/29/2011	to 09/01/2011	@ 19.7774 / day	59.33	59.33	
902.	Mortgage insurance premium for <input type="text"/> mos.	to			0.00	
903.	Homeowner's insurance for <input type="text"/> years	to				
904.		to				
905.		to				
906.		to				
1000.	Reserves Deposited with Lender		Line Amt	GFE	Borrower	Sel
1001.	Initial deposit for escrow account			6,472.75	6,472.75	
1002.	Homeowner's insurance	2 mo. @ \$177.67 per month	355.34			
1003.	Mortgage insurance					
1004.	Property taxes	11 mo. @ \$604.58 per month	6,650.38			
1005.						
1006.						
1007.	Aggregate Escrow Adjustment		-532.97			
1008.						
1009.						
1010.						
1100.	Title Charges		Line Amt	GFE	Borrower	Sel
1101.	Title services and lender's title insurance <input type="button" value="Details"/>	to		1,120.00	1,120.00	
1102.	Settlement or closing fee	to	250.00			
1103.	Owner's title insurance	to		1,222.00	1,222.00	
1104.	Lender's title insurance	to	750.00			
1105.	Lender's title policy limit	\$ 175,000.00				
1106.	Owner's title policy limit	\$ 225,000.00				

Save

Last revised: Jul 30, 2012

Ordering Closing Documents

After the fee screens, we will run a GFE vs. HUD comparison analysis to make sure you are within the legal tolerances for the various sections and fee types. **Any closing fee that was lower than the last disclosed amount will appear in green.** **Any closing fee that is higher than the last disclosed amount will appear in red.** Check to see if you need to cure any discrepancies. If a circumstance has changed, you will want to re-disclose the GFE and wait the appropriate number of days before closing. Click the "Next" button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
 https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
 Borrower: Daniel Boone
 Property: 3018 Edgewater Dr
 Loan Number: 123456789

Next →

Order Information
 Lender Information
 Lender Profile
 Settlement Agent
 Property Information
 Borrower(s)
 Loan Information
 Loan Detail
 Federal Box Disclosure
 Security Instrument Options
 Escrow Information
 HUD lines 100-600
 HUD lines 700-800
 HUD lines 900-1400
HUD vs GFE Tolerance Summary

HUD vs GFE Tolerance Summary

APR Summary

Interest Rate	APR	Disclosed APR	Point Difference
4.1250%	4.4067%	4.4023%	0.0043

This loan was **UNDERDISCLOSED** by 0.0043%

Charges That Cannot Increase

Fee Description	Line #	GFE Amt	Hud-1 Amt	Amount To Cure
Our origination charge	801	\$2,875.00	\$2,875.00	N/A
Credit or charge for interest rate	802	\$0.00	\$0.00	N/A
Your adjusted origination charges	803	\$2,875.00	\$2,875.00	N/A
Transfer taxes	1203	\$0.00	\$0.00	N/A

Charges That in Total Cannot Increase More Than 10%

Fee Description	Line #	GFE Amt	Hud-1 Amt
Government recording charges	1201	\$125.00	\$125.00
Appraisal fee	804	\$300.00	\$300.00
Credit report	805	\$25.00	\$25.00
Flood certification	807	\$12.00	\$12.00
Title services and lender's title insurance	1101	\$1,120.00	\$1,170.00
Owner's title insurance	1103	\$1,222.00	\$1,222.00

Total Charges: \$2,804.00 \$2,854.00
Increase between GFE and HUD-1 Charges: \$50.00 or 1.783%
Maximum Increase Allowed: \$280.40 or 10.0000%
Amount to Cure: \$0.00 or 0.0000%

Charges That Can Change

Fee Description	Line #	GFE Amt	Hud-1 Amt
Initial deposit for your escrow account	1001	\$6,472.75	\$6,472.75
Daily interest charges	901	\$59.33	\$59.33
Homeowner's insurance premium	903	\$0.00	\$0.00
Pest Inspection	1302	\$100.00	\$95.00

Save Close

Last revised: Jul 30, 2012

Ordering Closing Documents

There may be some documents that you would like in your package that we don't always include. You can select these optional documents here. Make sure to complete any required additional fields for those documents. Also, if you always want certain optional documents included in your package, let one of our operators know so that they can add them to your client spec sheet. Click the "Next" button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

Order Information
Lender Information
Lender Profile
Settlement Agent
Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options

HUD lines 700-800
HUD lines 900-1400
HUD vs GFE Tolerance Summary
Additional Docs & Conditions

Save Close

Additional Docs & Conditions

Additional Documents

- Upload additional PDF documents to include in this package.
- Endorsement Allonge to Note. Endorsed to
- 2nd Endorsement Allonge to Note. Endorsed to
- HUD-1 Settlement Statement. Printing Options: Complete Draft: No Totals: Yes
- Affidavit Regarding Good Faith Estimate (GFE). Latest GFE accepted and signed on
- Loans to One Borrower
- Warranty Deed General w/ VL (\$100 to the Seller)
- Bond Documents
- Buydown Agreement
- Amortization Schedule
- Assignment to Blank
- Statement from Homeowner Association regarding Dues
- HOA Agreement to Provide 60 Day Notice
- Builder's Warranty of Completion and Addendum
- Errors and Omissions
- IRS 4506-T
- Escrow Waiver
- Payment Shock Notice
- 1st Payment Letter
- RESPA Servicing Disclosure Statement MAY Transfer Servicing
- Name Affidavit(s)
- Residential Real Property Affidavit (No Change Survey Affidavit)
- Appraisal Receipt
- Borrower's Consent to Escrow Additional Funds (Improved-Construction to Perm)
- Unimproved Valuation Notice and Borrower's Consent to Escrow Additional Funds (Construction to Perm)
- Exempt Valuation Notice and Borrower's Consent to Escrow Additional Funds (i.e. over 65 or Veteran)
- Property Tax Information
- Mineral Rights Acknowledgement
- Hazard Insurance Information
- Fair Credit Reporting Act Notice

Ordering Closing Documents

If you would like to add specific funding conditions, title commitment corrections, sales contract amendments, or closing instructions, click on the “**Click to Edit**” link above the content box or the box itself. Keep in mind that this language only pulls onto the Supplemental Closing Instructions.

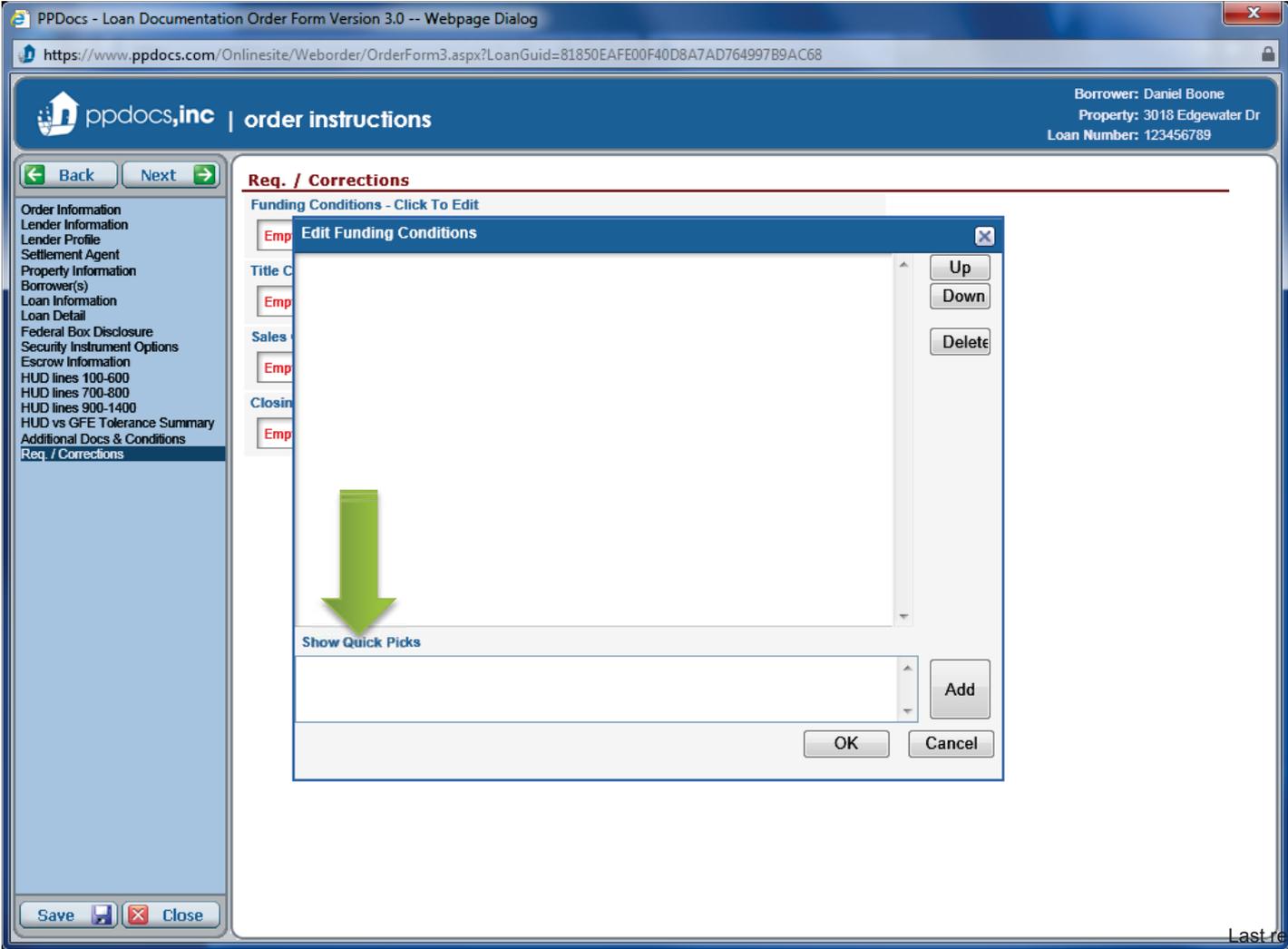
The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Message Dialog". The address bar displays the URL: <https://www.ppdocs.com/Onlinesite/Weborder/OrderForm.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68>. The page header includes the PPDocs, Inc. logo and the text "order instructions". On the right side of the header, the following information is displayed: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, and Loan Number: 123456789. A navigation bar contains "Back" and "Next" buttons. The main content area is titled "Req. / Corrections" and contains four sections, each with a "Click to Edit" link and an "Empty. Click to add." message in a text box:

- Funding Conditions - Click To Edit
- Title Commitment Corrections - Click To Edit
- Sales Contract Amendments - Click To Edit
- Closing Instructions - Click To Edit

A green arrow points to the "Req. / Corrections" section header. The left sidebar contains a list of navigation links: Order Information, Lender Information, Lender Profile, Settlement Agent, Property Information, Borrower(s), Loan Information, Loan Detail, Federal Box Disclosure, Security Instrument Options, Escrow Information, HUD lines 100-600, HUD lines 700-800, HUD lines 900-1400, HUD vs GFE Tolerance Summary, Additional Docs & Conditions, and Req. / Corrections. At the bottom of the window, there are "Save" and "Close" buttons.

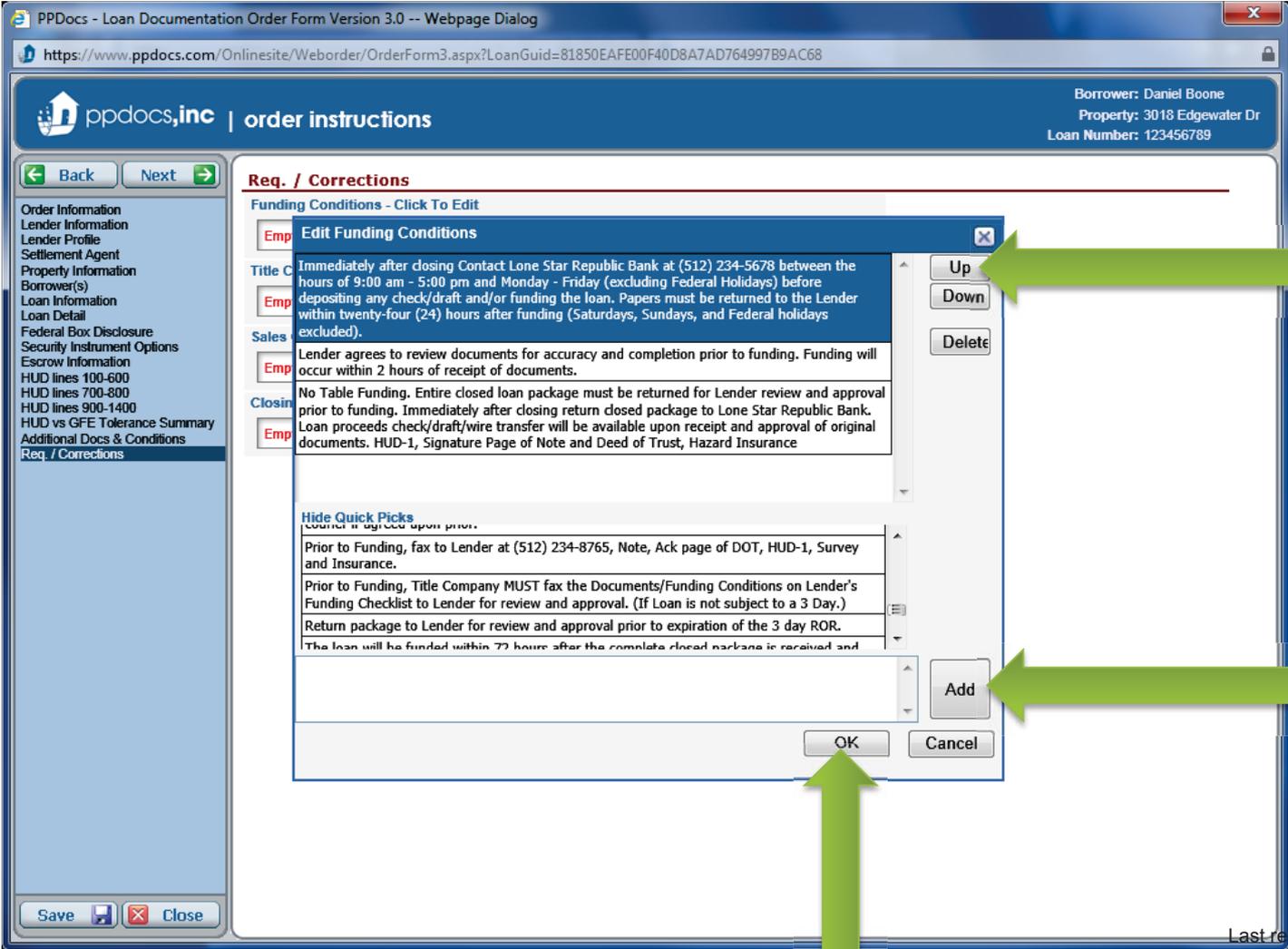
Ordering Closing Documents

When the edit window appears, you can either type your own text in the bottom box or click on the “**Show Quick Picks**” link to show a list of commonly used language for that particular box.



Ordering Closing Documents

When you click on an item from the “Quick Pick List”, it will add the language to the bottom text box, but it won’t add it to the top text box until you click the “Add” button. The top list box shows what will print and in the order it will appear. You can change the order in which the items print by highlighting them by clicking on them and then clicking the “Up” or “Down” button on the right. When done, click on the “OK” button to save the changes.



Ordering Closing Documents

Repeat the steps for the other categories as desired. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next →

- Order Information
- Lender Information
- Lender Profile
- Settlement Agent
- Property Information
- Borrower(s)
- Loan Information
- Loan Detail
- Federal Box Disclosure
- Security Instrument Options
- Escrow Information
- HUD lines 100-600
- HUD lines 700-800
- HUD lines 900-1400
- HUD vs GFE Tolerance Summary
- Additional Docs & Conditions
- Req. / Corrections

Req. / Corrections

[Funding Conditions - Click To Edit](#)

- Immediately after closing Contact Lone Star Republic Bank at (512) 234-5678 between the hours of 9:00 am - 5:00 pm and Monday - Friday (excluding Federal Holidays) before depositing any check/draft and/or funding the loan. Papers must be returned to the Lender within twenty-four (24) hours after funding (Saturdays, Sundays, and Federal holidays excluded).
- Lender agrees to review documents for accuracy and completion prior to funding. Funding will occur within 2 hours of receipt of documents.
- No Table Funding. Entire closed loan package must be returned for Lender review and approval prior to funding. Immediately after closing return closed package to Lone Star Republic Bank. Loan proceeds check/draft/wire transfer will be available upon receipt and approval of original documents. HUD-1, Signature Page of Note and Deed of Trust, Hazard Insurance

[Title Commitment Corrections - Click To Edit](#)

Empty. Click to add.

[Sales Contract Amendments - Click To Edit](#)

Empty. Click to add.

[Closing Instructions - Click To Edit](#)

Empty. Click to add.

Save [Icon] [Icon] Close

Ordering Closing Documents

Some screens, such as the First Payment Info., will only appear if you have selected the document on the “Additional Docs & Conditions” screen. Complete the information and click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

First Payment Info.

Payment to	Lone Star Republic Bank
Address line 1	1 Victory Boulevard
Address line 2	100
ZIP: City, State	78701 Austin TX
Phone number	(512) 234-5678 Ext.

Order Information
Lender Information
Lender Profile
Settlement Agent
Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options
Escrow Information
HUD lines 100-600
HUD lines 700-800
HUD lines 900-1400
HUD vs GFE Tolerance Summary
Additional Docs & Conditions
Req. / Corrections
First Payment Info.

Save Close

Ordering Closing Documents

Toward the end of the order form, we will show you our calculations for the TIL. Keep in mind that the format for the TIL has changed, but we wanted to make sure we showed you all of our various calculated results based off the data that has been provided in the order form. Take a moment to view the various tabs to make sure you haven't overlooked something. Click the "Next" button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog
 https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions
 Borrower: Daniel Boone
 Property: 3018 Edgewater Dr
 Loan Number: 123456789

Next →

Federal TIL Disclosure

Annual Percentage Rate	Finance Charge	Amount Financed	Total of Payments	Total Sale Price
4.4067%	\$ 63,326.33	\$ 171,653.67	\$ 234,980.00	\$ 0.00

Payment Schedule
 179 monthly payments of \$1,305.44 beginning October 1, 2011
 1 monthly payment of \$1,306.24 due on September 1, 2026

Finance Charge Summary | Payment Analysis | Amort Schedule | Worst Case Analysis | Worst Case Schedule

Flood certification	12.00
Daily interest charges	59.33
Settlement or closing fee	300.00
Loan origination fee	2,250.00
Underwriting fee	125.00
Processing fee	100.00
Application fee	25.00
Review fee	25.00
Closing fee	200.00
Attorney fee for docprep	150.00
Title escrow fee	55.00
Title courier fee/Express mail fee	45.00
Total Prepaid Finance Charges:	3,346.33
Plus Interest for Life of Loan	59,980.00
FINANCE CHARGE:	63,326.33

Save | Close

Ordering Closing Documents

If you selected on the “Order Information” screen that you wanted fulfillment services, you will see this screen. Here you will select the appropriate fulfillment services that you want for this particular order. You must be setup in advance to be able to order any fulfillment services. Contact fulfillment@ppdocs.com to get setup. Click the “Next” button to continue to the next screen.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68>. The page header includes the PPDocs logo and the text "order instructions". On the right side of the header, it displays: "Borrower: Daniel Boone", "Property: 3018 Edgewater Dr", and "Loan Number: 123456789".

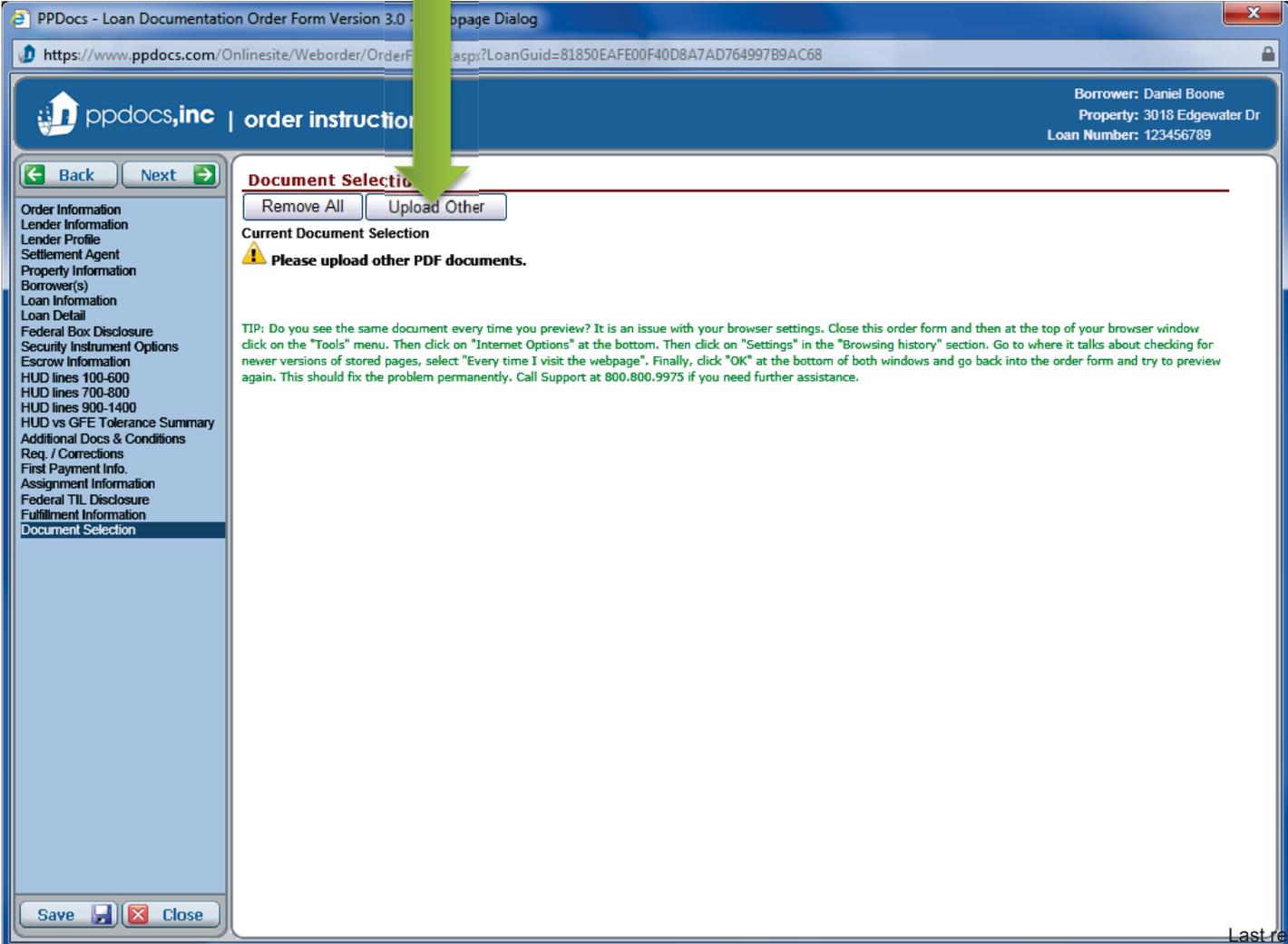
Below the header is a navigation bar with "Back" and "Next" buttons. The main content area is titled "Fulfillment Information" and contains the following text: "This transaction has been marked for post closing fulfillment services." Below this is a list of fulfillment services, each with a checkbox and a description:

- Pre-Closing HUD-1 Review**
 - Review of HUD-1 from the title company by comparing information and fees to our closing instructions, RESPA guidelines and client/investor dosing conditions.
 - Provide final HUD-1 approval to the title company and authorization to close the loan.
- Warehouse Bank Wire Request**
 - Create net funding breakdown.
 - Forward all applicable documentation (collateral package) to warehouse bank for wire request.
- Funding Approval**
 - Review copies of executed documents.
 - Confirm all investor funding conditions have been met.
 - Issue funding authorization to the title company.
- Closed Loan Package Audit and Delivery**
 - Review closed loan package to ensure that all documents have been correctly signed, dated, and notarized.
 - Ensure that all additional documentation is included in the package per the client/investor's funding requirements.
 - Scan closed loan package.
 - Deliver original Note to investor.
 - Stack and deliver closed loan package to investor for purchase.
 - Secure original closed loan package until investor purchase or return original package to client.
- Credit Package Delivery**
 - Obtain all applicable documents from client to create a credit package.
 - Stack and deliver to investor.
- Investor Purchase**
 - Notify client of any discrepancies.
 - Assist in obtaining necessary items.
 - Forward purchase advice, if applicable.
- Final Document Delivery**
 - Track and forward final and recorded documents.

At the bottom of the page, there is a "Please note" section: "Please note: Some options may not be available because additional setup needed or the loan information as entered is not eligible for fulfillment services. Please call our fulfillment group for more info." At the bottom left, there are "Save" and "Close" buttons.

Ordering Closing Documents

If you selected that you wanted to upload PDF documents to be included in your document package on the “Additional Docs” page, you will get this screen. At which point, you will click the “Upload Other” button to begin the process.



The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0" with a "Page Dialog" open. The address bar shows the URL: <https://www.ppdocs.com/Onlinesite/Weborder/OrderForm.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68>. The page header includes the PPDocs, Inc. logo and the text "order instruction". On the right side of the header, it displays: Borrower: Daniel Boone, Property: 3018 Edgewater Dr, and Loan Number: 123456789. A left-hand navigation menu lists various sections, with "Document Selection" highlighted. The main content area is titled "Document Selection" and contains two buttons: "Remove All" and "Upload Other". A green arrow points to the "Upload Other" button. Below the buttons, the text reads: "Current Document Selection" followed by a warning icon and the message "Please upload other PDF documents." A "TIP" section provides instructions for resolving a browser issue: "TIP: Do you see the same document every time you preview? It is an issue with your browser settings. Close this order form and then at the top of your browser window click on the 'Tools' menu. Then click on 'Internet Options' at the bottom. Then click on 'Settings' in the 'Browsing history' section. Go to where it talks about checking for newer versions of stored pages, select 'Every time I visit the webpage'. Finally, click 'OK' at the bottom of both windows and go back into the order form and try to preview again. This should fix the problem permanently. Call Support at 800.800.9975 if you need further assistance." At the bottom of the window, there are "Save" and "Close" buttons.

Ordering Closing Documents

First click the “Browse...” button to find the PDF file you want included in your package to the title company. Then properly title the document and give it a handling instruction for the settlement agent. Then click the “Upload” button. Keep in mind, extremely large files may take a while to upload and is limited to 5 MB.

The screenshot shows a web browser window titled "PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog". The address bar shows the URL: <https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68>. The page header includes the PPDocs, Inc. logo and the text "order instructions". On the right side of the header, it displays: "Borrower: Daniel Boone", "Property: 3018 Edgewater Dr", and "Loan Number: 123456789".

On the left side, there is a navigation menu with "Back" and "Next" buttons, and a list of menu items including "Order Information", "Lender Profile", "Settlement Agent", "Property Information", "Borrower(s)", "Loan Information", "Loan Detail", "Federal Box Disclosure", "Security Instrument Options", "Escrow Information", "HUD lines 100-600", "HUD lines 700-800", "HUD lines 900-1400", "HUD vs GFE Tolerance Summary", "Additional Docs & Conditions", "Req. / Corrections", "First Payment Info.", "Assignment Information", "Federal TIL Disclosure", "Fulfillment Information", and "Document Selection" (which is highlighted).

The main content area is titled "Document Selection" and contains the following elements:

- "Remove All" and "Upload Other" buttons.
- "Current Document Selection" section with a warning icon and the text: "Please upload other PDF documents."
- "Upload a PDF document" section with the instruction: "You may upload any PDF document to be a part of the package. The file MUST be a PDF file. Instructions for settlement agent and document title are required."
- A form with three input fields: "Title" (containing "Affidavit of Title"), "Instruction for settlement agent" (containing "Borrower(s) to sign two copies. Return to Lender."), and "PDF File" (containing "E:\PDFs\Affidavit of Title.pdf" and a "Browse..." button).
- An "Upload" button.

Four green arrows point to the "Title", "Instruction for settlement agent", "PDF File" field, and the "Upload" button. A fifth green arrow points to the "Document Selection" menu item in the left sidebar.

At the bottom of the page, there is a "TIP" section: "TIP: Do you see the same document every time you preview? It is an issue with your browser settings. Close this order form and then at the top of your browser window click on the 'Tools' menu. Then click on 'Internet Options' at the bottom. Then click on 'Content Advisor' in the 'Content Advisor' section. Go to where it talks about checking for newer versions of stored pages, select 'Every time I visit the webpage'. Finally, click on 'Content Advisor' at the bottom of both windows and go back into the order form and try to preview again. This should fix the problem permanently. Call Support at 800.800.9975 if you need further assistance."

At the bottom left of the browser window, there are "Save" and "Close" buttons. At the bottom right, the text "Last revised: Jul 30, 2012" is visible.

Ordering Closing Documents

You will see your uploaded document in the document selection list. You can click on the “Remove” link if you wish to delete the document from the package. Click the “Next” button to continue to the next screen.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

Order Information
Lender Information
Lender Profile
Settlement Agent
Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options
Escrow Information
HUD lines 100-600
HUD lines 700-800
HUD lines 900-1400
HUD vs GFE Tolerance Summary
Additional Docs & Conditions
Req. / Corrections
First Payment Info.
Assignment Information
Federal TIL Disclosure
Fulfillment Information
Document Selection

Document Selection

Remove All Upload Other

Current Document Selection

Sort	Doc Info	Description	Preview	Remove
	1001	Affidavit of Title	Preview	Remove

TIP: Do you see the same document every time you preview? It is an issue with your browser settings. Close this order form and then at the top of your browser window click on the "Tools" menu. Then click on "Internet Options" at the bottom. Then click on "Settings" in the "Browsing history" section. Go to where it talks about clearing for newer versions of stored pages, select "every time I visit the webpage". Finally, click "OK" at the bottom of both windows and go back into the order form and then review again. This should fix the problem permanently. Call Support at 800.800.9975 if you need further assistance.

Save Close

Ordering Closing Documents

Once again you will get an audit result screen. There are two audit warnings. **Stop Audits (in red)**, which won't allow you to continue until something has been fixed, and **Warning Audits (in yellow)**, that are telling you about something unusual, but you can acknowledge by clicking on the box to the left. When provided, click on the "more..." link to read more information about the audit, "go to" to be taken to the screen to where you can make the appropriate correction, or "fix it" to correct the data immediately. When all items have been acknowledged or cleared, click the "Next" button to continue.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Next

Order Information
Lender Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options
Escrow Information
HUD lines 100-600
HUD lines 700-800
HUD lines 900-1400
HUD vs GFE Tolerance Summary
Additional Docs & Conditions
Req. / Corrections
First Payment Info.
Assignment Information
Federal TIL Disclosure
Fulfillment Information
Document Selection
Auditor

Auditor

Audit Result

The document selection contains customized or uploaded documents. Changes made in the system will not update on these documents.
Acknowledged by Samuel Houston on 8/23/2011 2:34:16 PM

✓ FNMA 5% Audit PASSED

✓ Section 35 Audit PASSED

✓ State High Cost Analysis PASSED

Other Information

💡 *PPDocs, Inc. now offers HUD review and post closing fulfillment services. Contact our Fulfillment Team at 817.784.2009 or fulfillment@ppdocs.com for details. [more...]

💡 Already have your support documents in .PDF/.TIF format? [more...]

💡 Beginning today we are putting MIP, VA Funding Fee, PMI and USDA fee in line 902 of the HUD-1. These is a change we feel necessary with further interpretation of RESPA

💡 Did you know what you can UPLOAD DOCUMENTS to be added to your package? [more...]

💡 Do you know you can CHAT LIVE with the operator working on your file? [more...]

💡 New privacy policy required January 1, 2011. Samples and more information can be found [here](#).

💡 Want to brand the document delivery e-mails and download screen with your company's logo and message? [more...]

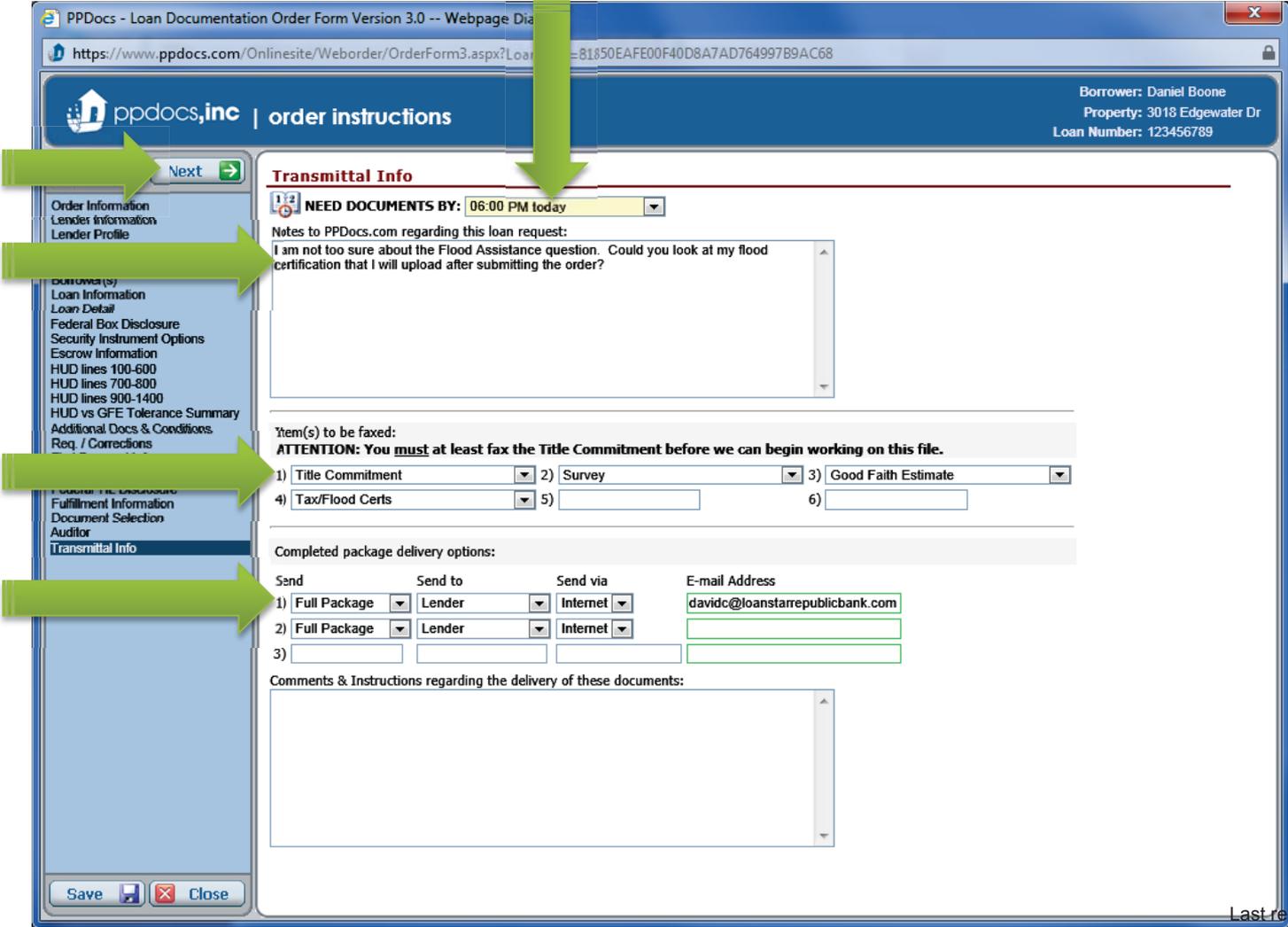
💡 Want to HIDE ORDER FORMS that you never use? [more...]

Please Note: We audit all loans for federal high cost (Section 32 -HOEPA) compliance. We expand that audit to run on purchase transactions even though those transactions are not now covered by federal high cost (Section 32 -HOEPA) regulations. We do not check loans for compliance for other state or other local predatory lending laws. Be certain you know the laws of the state in which you are lending.

Save Close

Ordering Closing Documents

Once all audits have been cleared or acknowledged, you can continue to this screen. Here you will see any notes you have made and can add notes to the order. You also let us know when you need the document package back by. Also, please indicate which support documents you will be faxing/uploading for our review. Finally, provide the e-mail address you want the package delivered to and click the “Next” button to continue.



Ordering Closing Documents

Now you are ready to submit your order for documents by simply clicking on the big green button.

PPDocs - Loan Documentation Order Form Version 3.0 -- Webpage Dialog

https://www.ppdocs.com/Onlinesite/Weborder/OrderForm3.aspx?LoanGuid=81850EAFE00F40D8A7AD764997B9AC68

ppdocs,inc | order instructions

Borrower: Daniel Boone
Property: 3018 Edgewater Dr
Loan Number: 123456789

Back Next

Order Information
Lender Information
Lender Profile
Settlement Agent
Property Information
Borrower(s)
Loan Information
Loan Detail
Federal Box Disclosure
Security Instrument Options
Escrow Information
HUD lines 100-600
HUD lines 700-800
HUD lines 900-1400
HUD vs GFE Tolerance Summary
Additional Docs & Conditions
Req. / Corrections
First Payment Info

Fulfillment Information
Document Selection
Auditor
Transmittal Info
Submit Request

Submit Request

Full Service

PeirsonPatterson, LLP will perform quality control of data based on the information entered on these order forms and provided via fax. We will select required document as well as review title commitment and survey. We will prepare your package and notify you by email when it is ready. Please be available for questions if they arise. You must at least fax the Title Commitment before we can begin working on this file. Print the fax cover sheet and send it along with the Title Commitment and Survey (if available) to the fax number indicated.

ATTENTION: You must at least fax the Title Commitment before we can begin working on this file.

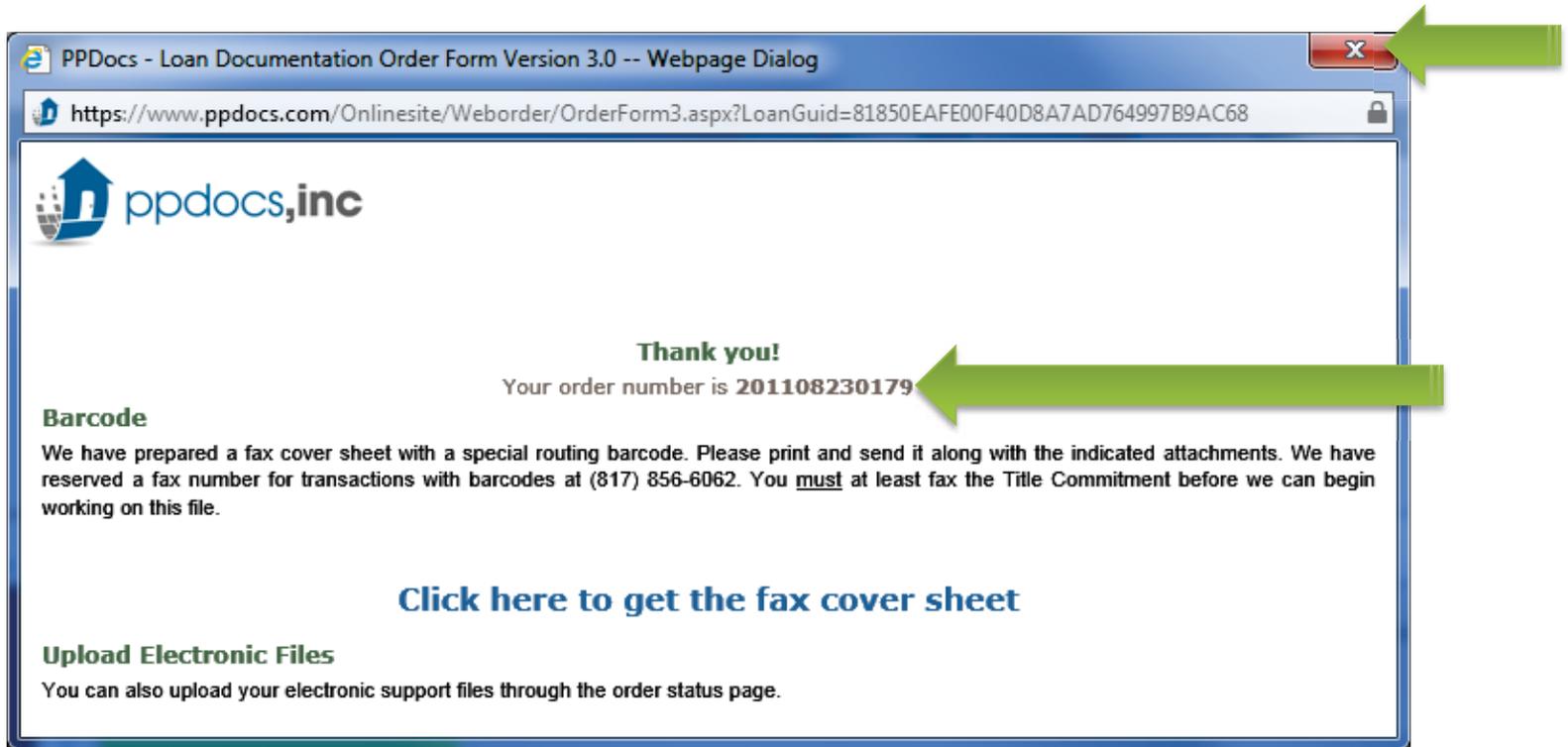
We have programmed certain audits to warn the user of creating a loan that may exceed federal high cost (Section 32/HOEPA) limits, a particular state's high cost limits, or FNMA's 5% limit. Our audits are only as good as the information entered. Our closers are not responsible for determining which fees are to be included and which are not. That is the lender's responsibility. Remember, in most instances, if a fee which is usually excluded from APR calculations, such as appraisals or credit reports, is paid to the lender or to an affiliate of the lender, the fee should then be included in the calculations for high cost (State and Federal). We have made certain assumptions and may have included too many items in the calculations. You may un-flag them as needed. Also, "bona fide" discount points may be allowed in some cases. The lender can adjust the calculations to not include those.

Submit Full Service Request

Save Close

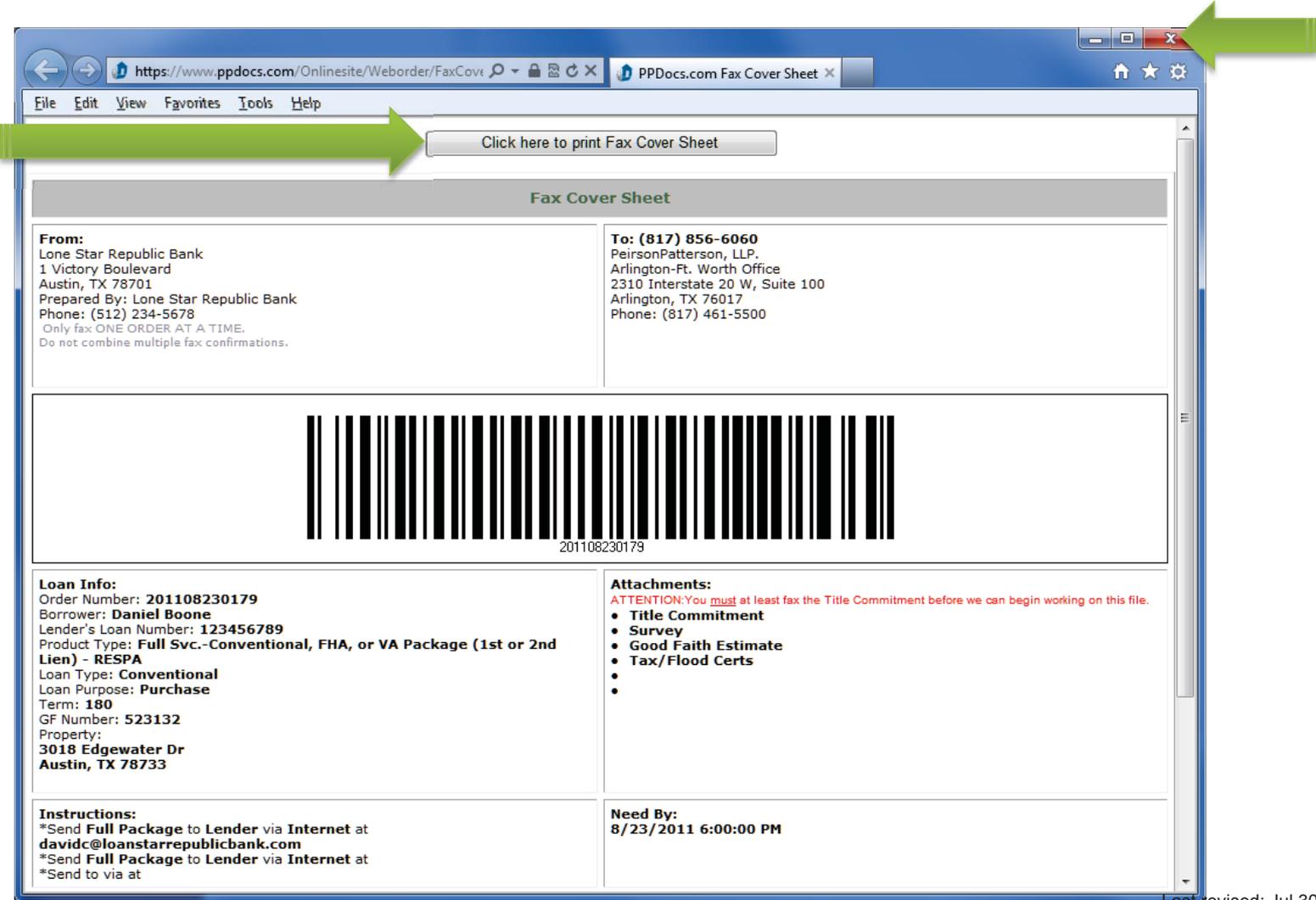
Ordering Closing Documents

You will get an order number as confirmation of a successful submission. If you intend on e-mailing your support documents, click on the “[Click here to get the fax cover sheet](#)” link to do just that. If you intend on uploading your support documents, simply click the “X” at the top right of the window.



Ordering Closing Documents

When the fax cover sheet opens up, wait and make sure you can see the bar code before clicking the “Click here to print Fax Cover Sheet” button at the top of the page. The bar code is needed for the server to route the documents to the correct order. When you have done that, close the window by clicking on the “X” at the top right corner.

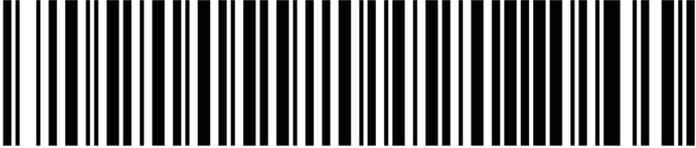


The screenshot shows a web browser window with the address bar displaying <https://www.ppdocs.com/Onlinesite/Weborder/FaxCover>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. A green arrow points to the 'Click here to print Fax Cover Sheet' button at the top of the page. Another green arrow points to the 'X' button in the browser's window control bar at the top right corner.

Fax Cover Sheet

From:
Lone Star Republic Bank
1 Victory Boulevard
Austin, TX 78701
Prepared By: Lone Star Republic Bank
Phone: (512) 234-5678
Only fax ONE ORDER AT A TIME.
Do not combine multiple fax confirmations.

To: (817) 856-6060
PeirsonPatterson, LLP.
Arlington-Ft. Worth Office
2310 Interstate 20 W, Suite 100
Arlington, TX 76017
Phone: (817) 461-5500


201108230179

Loan Info:
Order Number: 201108230179
Borrower: Daniel Boone
Lender's Loan Number: 123456789
Product Type: Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - RESPA
Loan Type: Conventional
Loan Purpose: Purchase
Term: 180
GF Number: 523132
Property:
3018 Edgewater Dr
Austin, TX 78733

Attachments:
ATTENTION: You must at least fax the Title Commitment before we can begin working on this file.
• Title Commitment
• Survey
• Good Faith Estimate
• Tax/Flood Certs
•

Instructions:
*Send Full Package to Lender via Internet at davidc@loanstarrepublicbank.com
*Send Full Package to Lender via Internet at
*Send to via at

Need By:
8/23/2011 6:00:00 PM

Ordering Closing Documents

Once you have submitted your order, our operators will wait to begin working on the documents until they have received the support documents via fax or upload. See “**Adding Attachments**” section for instructions on how to upload your support documents.

Download Documents Logout Search...

ppdocs,inc Home Services Resources FAQ News Contact Account

Home > Account > Case File Manager > Order Status

Loan Information

Borrower:	Michael Young
Property:	12355 Northside Drive, TX
Lender:	ABC Lender
Loan Number:	111711
Last Modified:	7/23/2012 11:56:43 AM
Profile:	Carrie Goff, CBA
Template:	
Import:	PointWC 24

Selected Product

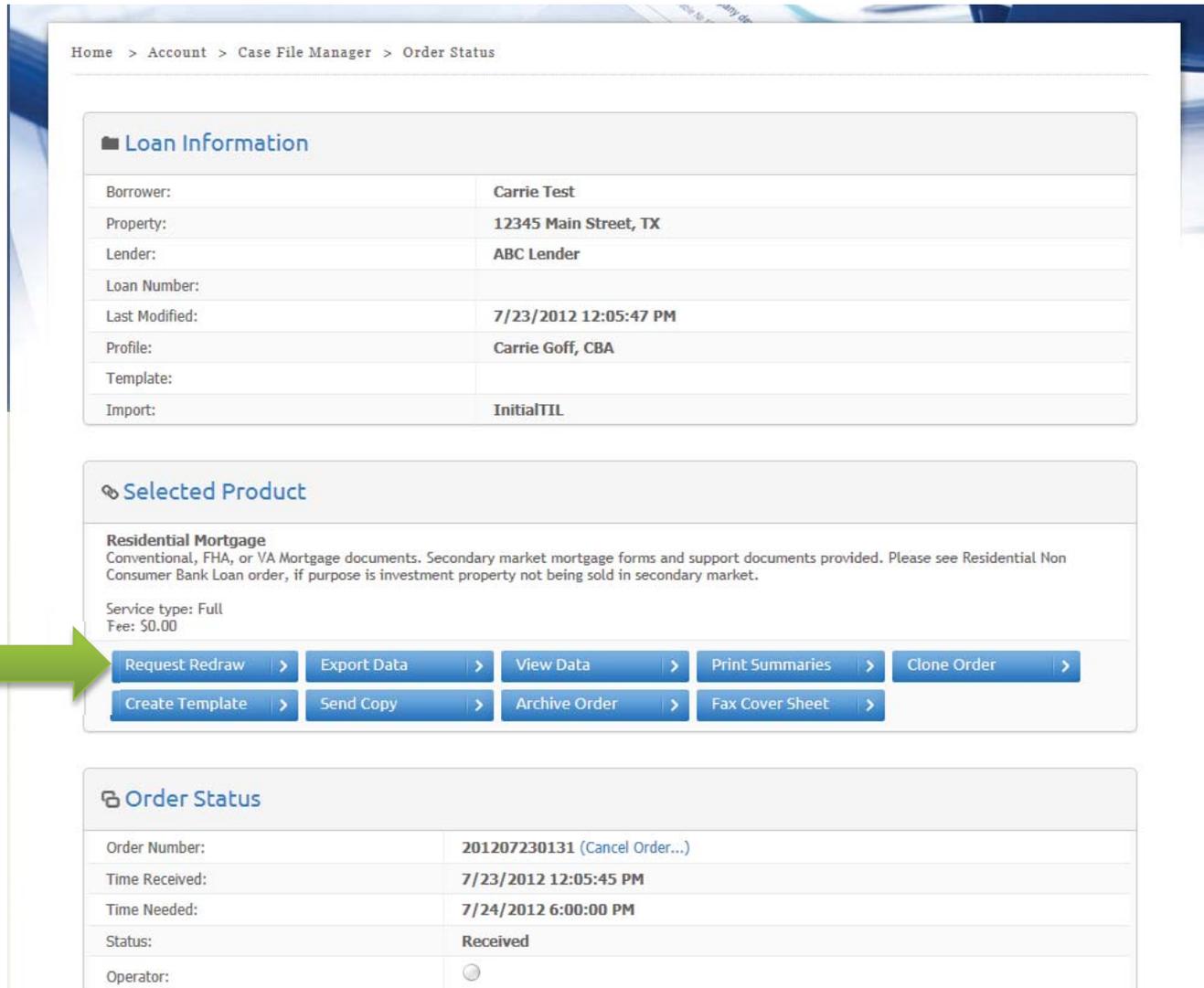
Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Express
Fee: \$0.00

Open Order Form > Import Data > Export Data > View Data > Print Summaries >
Clone Order > Create Template > Send Copy > Archive Order > Fax Cover Sheet >

Requesting Redraws

One of the new buttons is the “**Request Redraw**” button. If you need to make a change to the order or supply additional information, it is preferred that you use this method. Click the “**Request Redraw**” button to begin.



Home > Account > Case File Manager > Order Status

Loan Information

Borrower:	Carrie Test
Property:	12345 Main Street, TX
Lender:	ABC Lender
Loan Number:	
Last Modified:	7/23/2012 12:05:47 PM
Profile:	Carrie Goff, CBA
Template:	
Import:	InitialTIL

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: \$0.00

[Request Redraw](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) > [Clone Order](#) >
[Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230131 (Cancel Order...)
Time Received:	7/23/2012 12:05:45 PM
Time Needed:	7/24/2012 6:00:00 PM
Status:	Received
Operator:	

Requesting Redraws

Some orders will qualify for “self service” redraws. Simply reopen the case and make the necessary changes. If you would rather just tell us what changed, click on the “tell us what changed” box and type it in the text box.



Home > Account > Case File Manager > Order Redraw

Select Redraw Option

[Reopen the case](#)
Reopen the case so you can make your changes in the order form. You will be able to go through the screens again. You can submit the changes to us for review or submit the changes yourself for faster turn-around, your choice. We are working hard to make redraws easier. Soon, you will be able to re-import changes from your LOS when you request a redraw. Please give us a call to learn more about this feature.

[Tell us what changed](#)
Make a request for new package by telling us what changed. Tell us in your own words.

FAQ	Calculators	User Agreement	Share this page Refer a friend Contact us	Stay connected f t
Fee Matrix	Loan Ordering Step By Step	Warranty		
Disclosure Matrix	Glossary	Send P&P an Instant Message		

Requesting Redraws

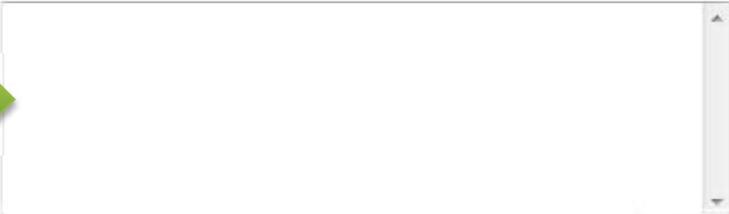
In the top text area, type in what exactly you are requesting to be redrawn or added to the order. There are a couple other questions that we would like to know, so please provide the answers to those. Also, provide the e-mail address for the person who will be receiving the redraw set of documents.

Home > Account > Case File Manager > Order Redraw

Simple Request

In the text box below, please indicate what information about the order has changed. Click the 'Request Redraw' button when finished. Our team of professionals will redraw your documents and send them to you as soon as possible.

Example:
Base Loan Amount = \$100,000.00
Total Loan Amount = \$110,000.00
Loan Term = 180 months

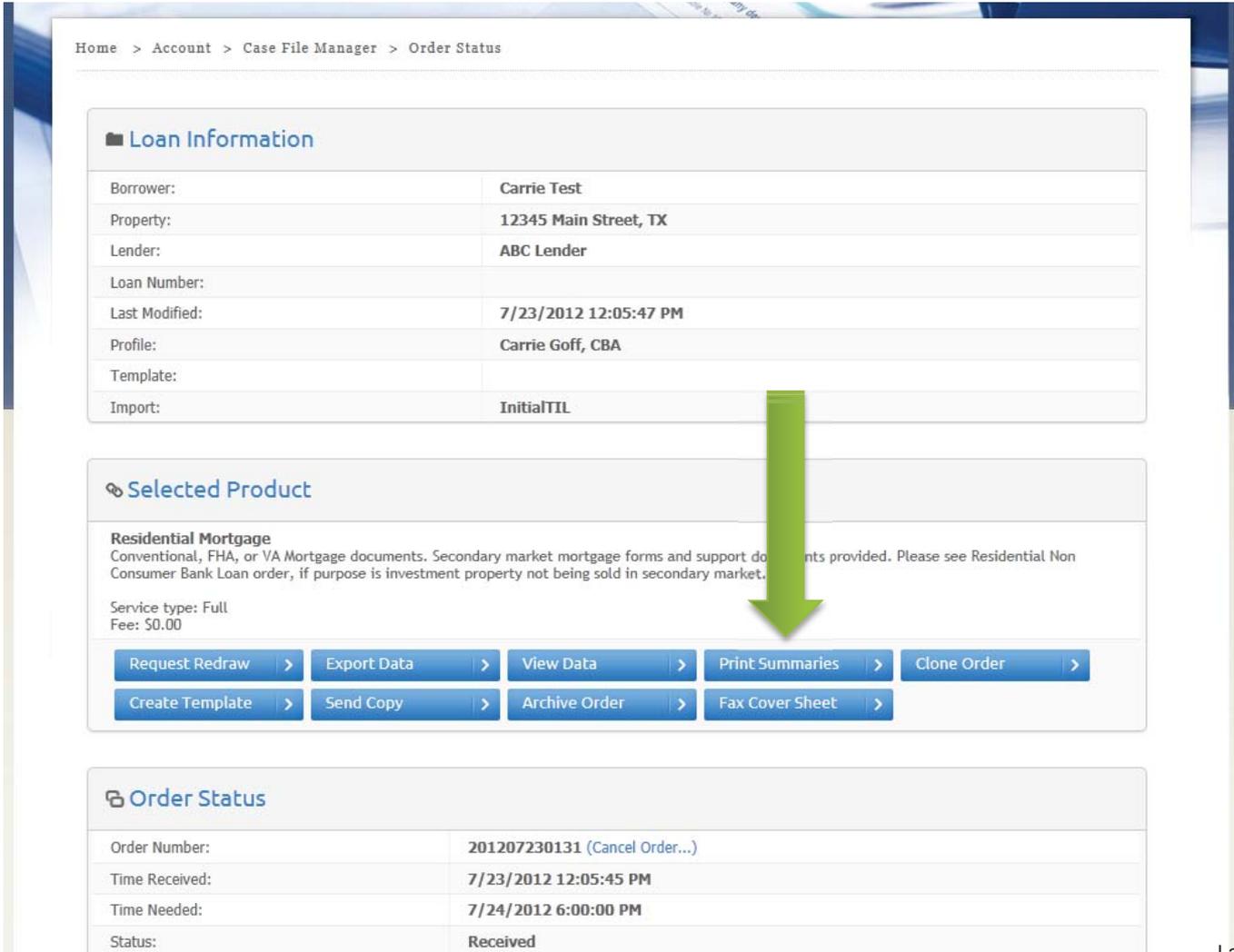


Last TIL received date:	<input type="text" value="7/24/2012"/>
Last APR disclosed:	<input type="text" value="4.3500"/>
Send new package to:	<input type="text"/>
Has this loan already closed and funded?	<input type="checkbox"/> <input type="checkbox"/>

[Request Redraw >](#)

Printing Summaries

As an added benefit, we have included a button that will allow you to view the various compliance calculations we run on our transactions so that you may print them off for your file. Click on the “**Print Summaries**” button to pull up a window of calculations.



Home > Account > Case File Manager > Order Status

Loan Information

Borrower:	Carrie Test
Property:	12345 Main Street, TX
Lender:	ABC Lender
Loan Number:	
Last Modified:	7/23/2012 12:05:47 PM
Profile:	Carrie Goff, CBA
Template:	
Import:	InitialTIL

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: \$0.00

[Request Redraw](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) > [Clone Order](#) >

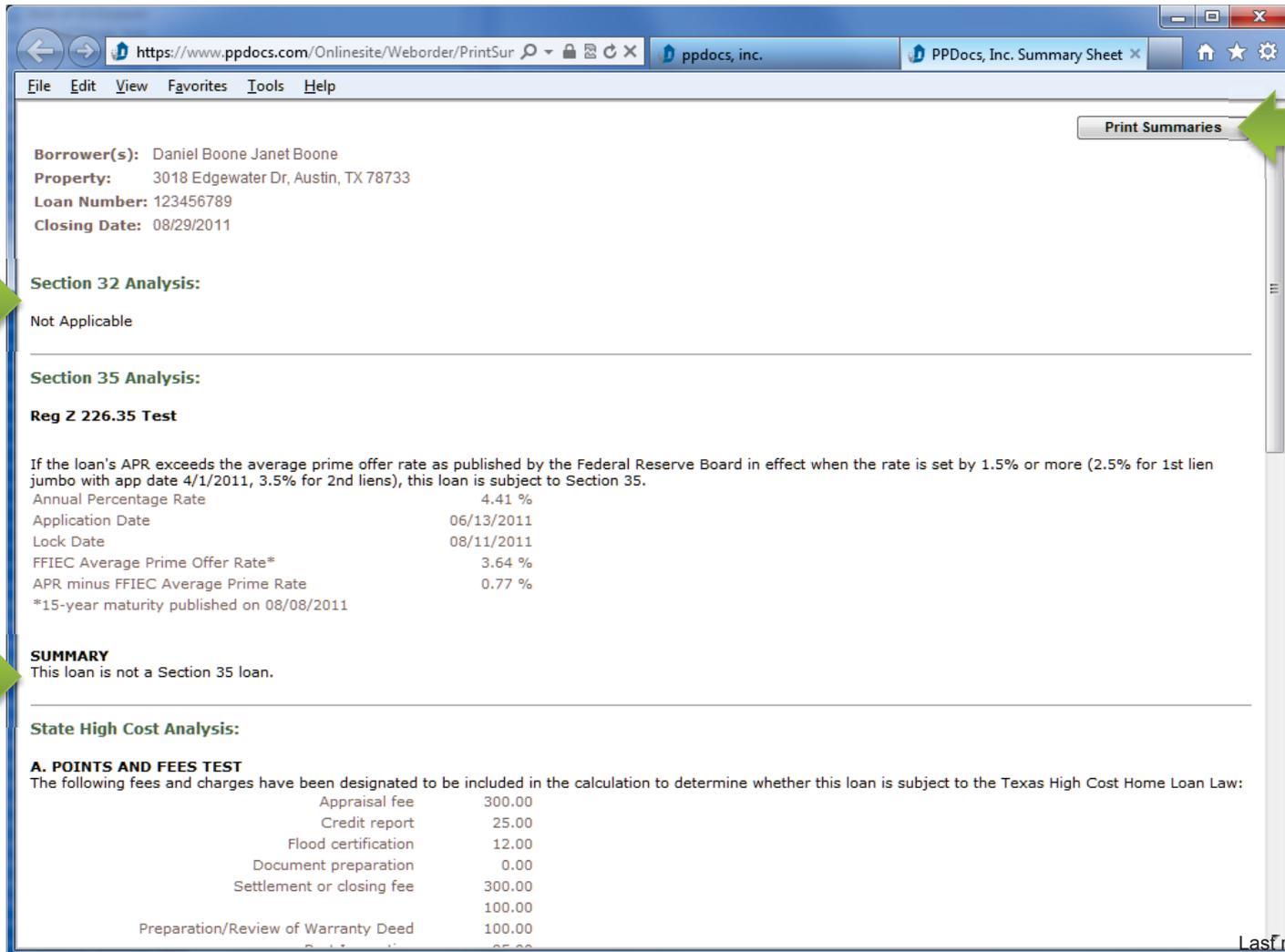
[Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230131 (Cancel Order...)
Time Received:	7/23/2012 12:05:45 PM
Time Needed:	7/24/2012 6:00:00 PM
Status:	Received

Printing Summaries

You will see exactly what analysis is being performed and the summary of our calculations. If an analysis is not needed for a certain transaction type, it will tell you it is “Not applicable”. Click the “**Print Summaries**” button at the top right to send this page to your printer.



The screenshot shows a web browser window with the URL <https://www.ppdocs.com/Onlinesite/Weborder/PrintSur>. The browser's address bar shows the domain 'ppdocs, inc.' and the page title 'PPDocs, Inc. Summary Sheet'. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. A green arrow points to a 'Print Summaries' button in the top right corner of the page content.

Borrower(s): Daniel Boone Janet Boone
Property: 3018 Edgewater Dr, Austin, TX 78733
Loan Number: 123456789
Closing Date: 08/29/2011

Section 32 Analysis:
Not Applicable

Section 35 Analysis:
Reg Z 226.35 Test
If the loan's APR exceeds the average prime offer rate as published by the Federal Reserve Board in effect when the rate is set by 1.5% or more (2.5% for 1st lien jumbo with app date 4/1/2011, 3.5% for 2nd liens), this loan is subject to Section 35.

Annual Percentage Rate	4.41 %
Application Date	06/13/2011
Lock Date	08/11/2011
FFIEC Average Prime Offer Rate*	3.64 %
APR minus FFIEC Average Prime Rate	0.77 %

*15-year maturity published on 08/08/2011

SUMMARY
This loan is not a Section 35 loan.

State High Cost Analysis:
A. POINTS AND FEES TEST
The following fees and charges have been designated to be included in the calculation to determine whether this loan is subject to the Texas High Cost Home Loan Law:

Appraisal fee	300.00
Credit report	25.00
Flood certification	12.00
Document preparation	0.00
Settlement or closing fee	300.00
	100.00
Preparation/Review of Warranty Deed	100.00

Adding Attachments

If you haven't faxed in your support documents and would rather upload them, on the Order Information screen scroll down to the section that is labeled "Attachments". Click the "Add new attachment..." link to begin the upload process.

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: \$0.00

[Request Redraw](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) > [Clone Order](#) >
[Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230131 (Cancel Order...)
Time Received:	7/23/2012 12:05:45 PM
Time Needed:	7/24/2012 6:00:00 PM
Status:	Received
Operator:	

Attachment

[ADD NEW ATTACHMENT](#)

Attachment	Tag	Size	Date	Option
OrderFrm.htm	OrderForm	1 KB	7/23/2012 12:05:47 PM	
InvestorSpec.htm	Check list	1 KB	7/23/2012 12:05:47 PM	
StateSpec.htm	Check list	6 KB	7/23/2012 12:05:46 PM	
ClientSpec.htm	Check list	2 KB	7/23/2012 12:05:46 PM	

Adding Attachments

From the drop down list, tell us what type of support document is being uploaded. Then click **“Upload”** to find the support document file on your machine. It will then be attached to your order for us to view.

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: 50.00

[Request Redraw](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) > [Clone Order](#) >
[Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230131 (Cancel Order...)
Time Received:	7/23/2012 12:05:45 PM
Time Needed:	7/24/2012 6:00:00 PM
Status:	Received
Operator:	<input type="radio"/>

Attach to Order

You may upload items as attachments to this order in lieu of faxing them. Otherwise, you may fax items over using the [barcoded fax cover sheet](#) which will then be made available as an attachment.

Attaching:

File:

Attachments will be scanned for virus. It may take a few minutes before the attachment appears in the list.

Adding Attachments

You will see the attached file in your list of attachments. You can click on the link and view any attachments at any time. We don't delete any attachments. You will also see your redraw requests and any chat transcripts related to this order.

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: 50.00

[Request Redraw](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) > [Clone Order](#) >
[Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230131 (Cancel Order...)
Time Received:	7/23/2012 12:05:45 PM
Time Needed:	7/24/2012 6:00:00 PM
Status:	Received
Operator:	<input type="radio"/>

Attachment

[ADD NEW ATTACHMENT](#)

Attachment	Tag	Size	Date	Option
 Title Commitment.pdf	Support documents	71 KB	7/23/2012 1:16:36 PM	
 OrderFrm.htm	OrderForm	1 KB	7/23/2012 12:05:47 PM	
 InvestorSpec.htm	Check list	1 KB	7/23/2012 12:05:47 PM	
 StateSpec.htm	Check list	6 KB	7/23/2012 12:05:46 PM	



Using Instant Message

If you would like to chat with the operator working on your order, from the Loan Information screen, click on the operator's name if the light is green. If the light is not green, you can click on "Send P&P an Instant Message" at the very bottom to try someone else, *however*, they may be less familiar with the specifics of your transaction.

Loan Information

Borrower:	Carrie Test
Property:	12345 Main Street, TX
Lender:	ABC Lender
Loan Number:	
Last Modified:	7/23/2012 1:16:50 PM
Profile:	Carrie Goff, CBA
Template:	
Import:	InitialTIL

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Full
Fee: \$0.00

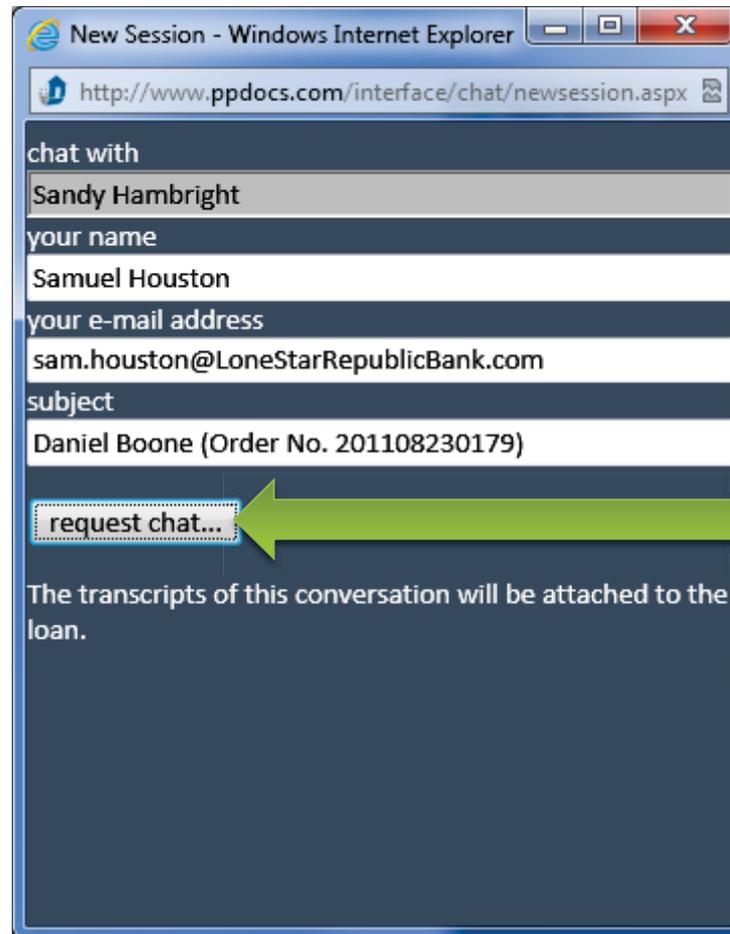
[Request Redraw](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) > [Clone Order](#) >
[Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230131 (Cancel Order...)
Time Received:	7/23/2012 12:05:45 PM
Time Needed:	7/24/2012 6:00:00 PM
Status:	Processing
Operator:	 Carrie

Using Instant Message

Click on the “request chat...” button to initiate a live chat with the operator.



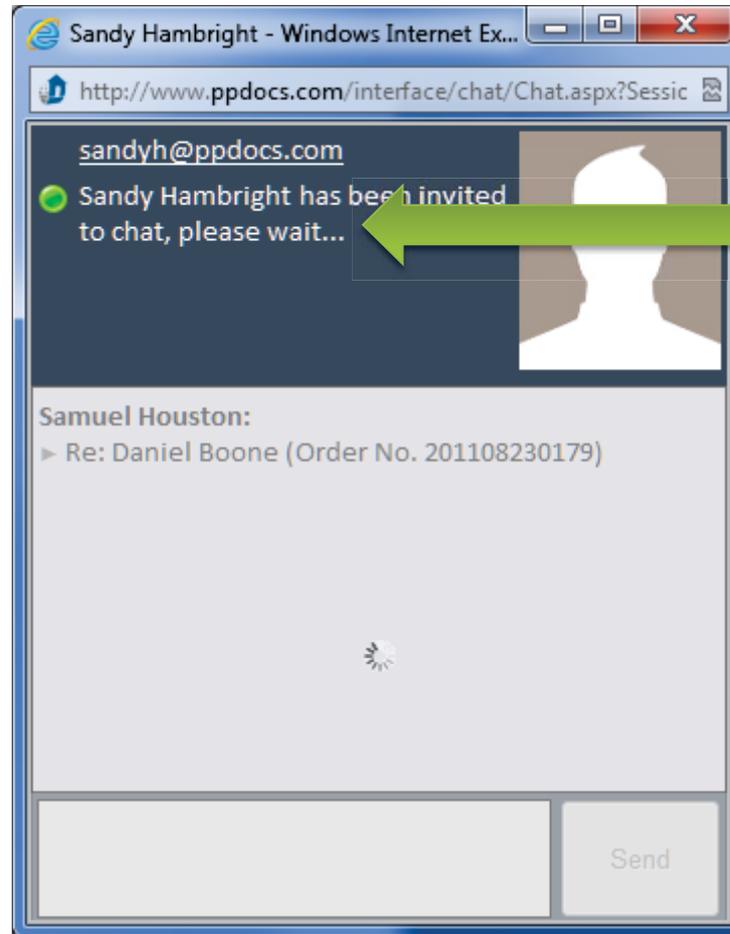
The screenshot shows a web browser window titled "New Session - Windows Internet Explorer". The address bar displays the URL <http://www.ppdocs.com/interface/chat/newsession.aspx>. The form contains the following fields:

- chat with: Sandy Hambright
- your name: Samuel Houston
- your e-mail address: sam.houston@LoneStarRepublicBank.com
- subject: Daniel Boone (Order No. 201108230179)

Below the subject field is a button labeled "request chat...". A large green arrow points from the right side of the screen towards this button. Below the button, the text reads: "The transcripts of this conversation will be attached to the loan."

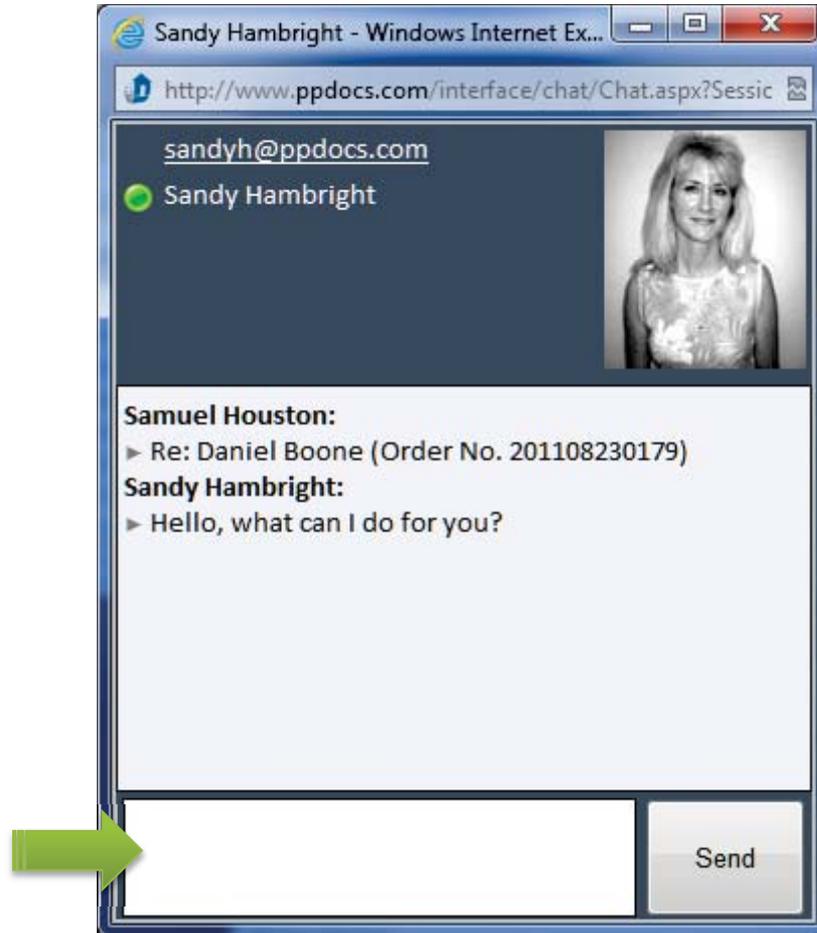
Using Instant Message

Wait a few moments for the operator to answer your chat request. If they are at their desk, they will answer the request ASAP.



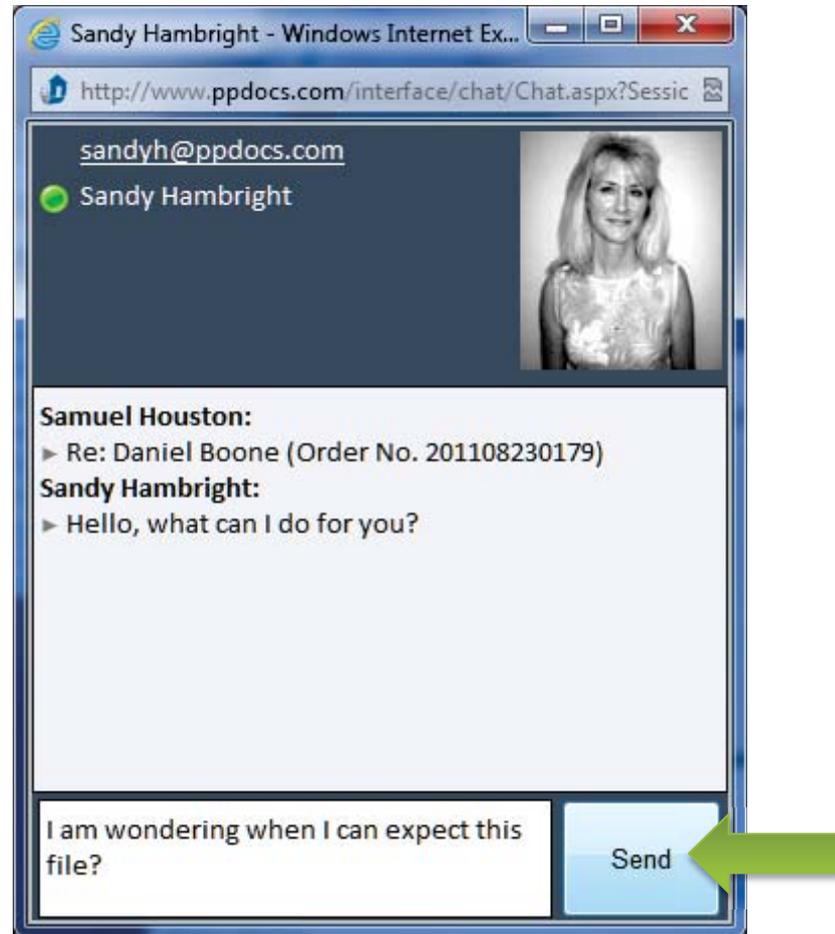
Using Instant Message

Once the operator answers your chat request, begin typing in the text box at the bottom of the window.



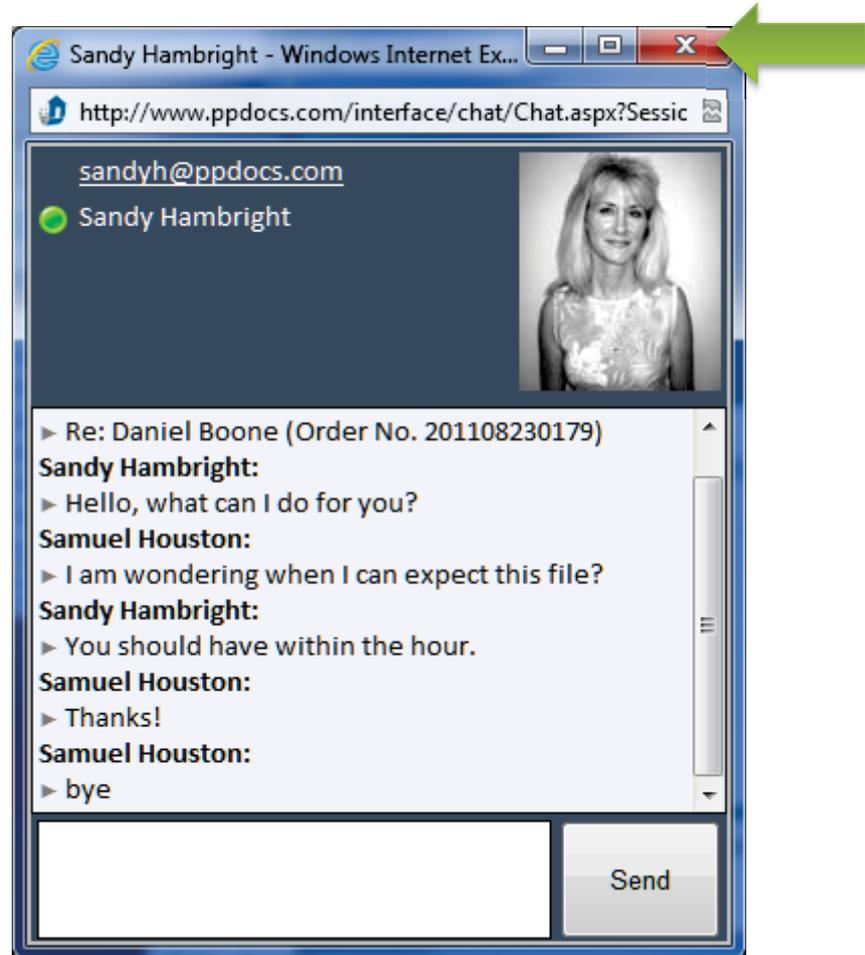
Using Instant Message

Click the “Send” button or hit your “Enter” key in order to send your message to the operator.



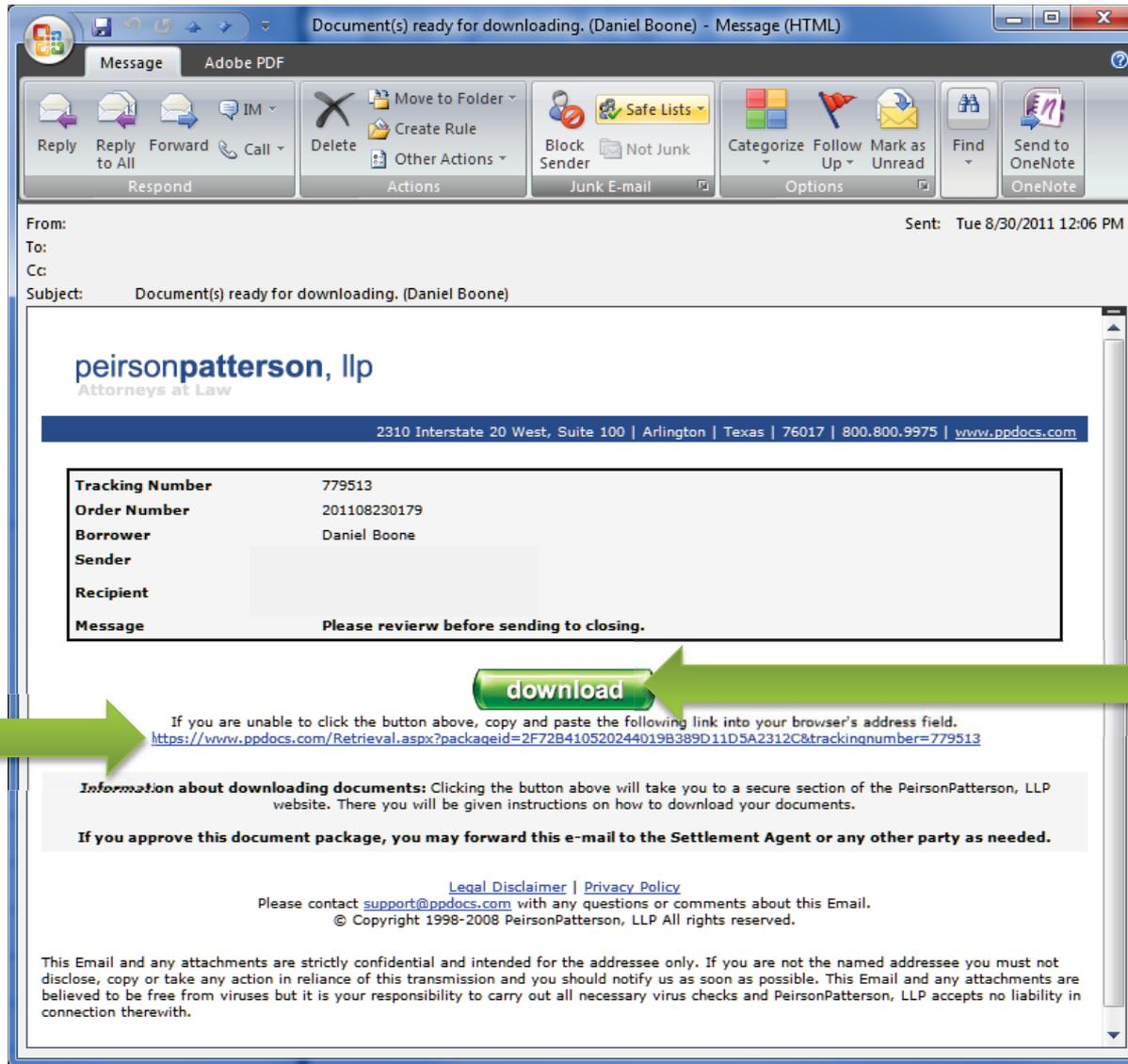
Using Instant Message

Once your conversation is over, click on the "X" at the top right of the window. Remember, chat transcripts are archived with the order.



Receiving Documents

When your documents have been completed you will receive an e-mail entitled “Document(s) ready for downloading.” Click on the “download” button, or if you can’t see the button, click on the link below where the button would be.



Document(s) ready for downloading. (Daniel Boone) - Message (HTML)

Message Adobe PDF

Reply Reply to All Forward Call IM Delete Move to Folder Create Rule Other Actions Block Sender Not Junk Safe Lists Junk E-mail Categorize Follow Up Mark as Unread Find Send to OneNote

From: Sent: Tue 8/30/2011 12:06 PM
To:
Cc:
Subject: Document(s) ready for downloading. (Daniel Boone)

peirsonpatterson, llp
Attorneys at Law

2310 Interstate 20 West, Suite 100 | Arlington | Texas | 76017 | 800.800.9975 | www.ppdocs.com

Tracking Number	779513
Order Number	201108230179
Borrower	Daniel Boone
Sender	
Recipient	
Message	Please review before sending to closing.

download

If you are unable to click the button above, copy and paste the following link into your browser's address field.
<https://www.ppdocs.com/Retrieval.aspx?packageid=2F72B410520244019B389D11D5A2312C&trackingnumber=779513>

Information about downloading documents: Clicking the button above will take you to a secure section of the PeirsonPatterson, LLP website. There you will be given instructions on how to download your documents.

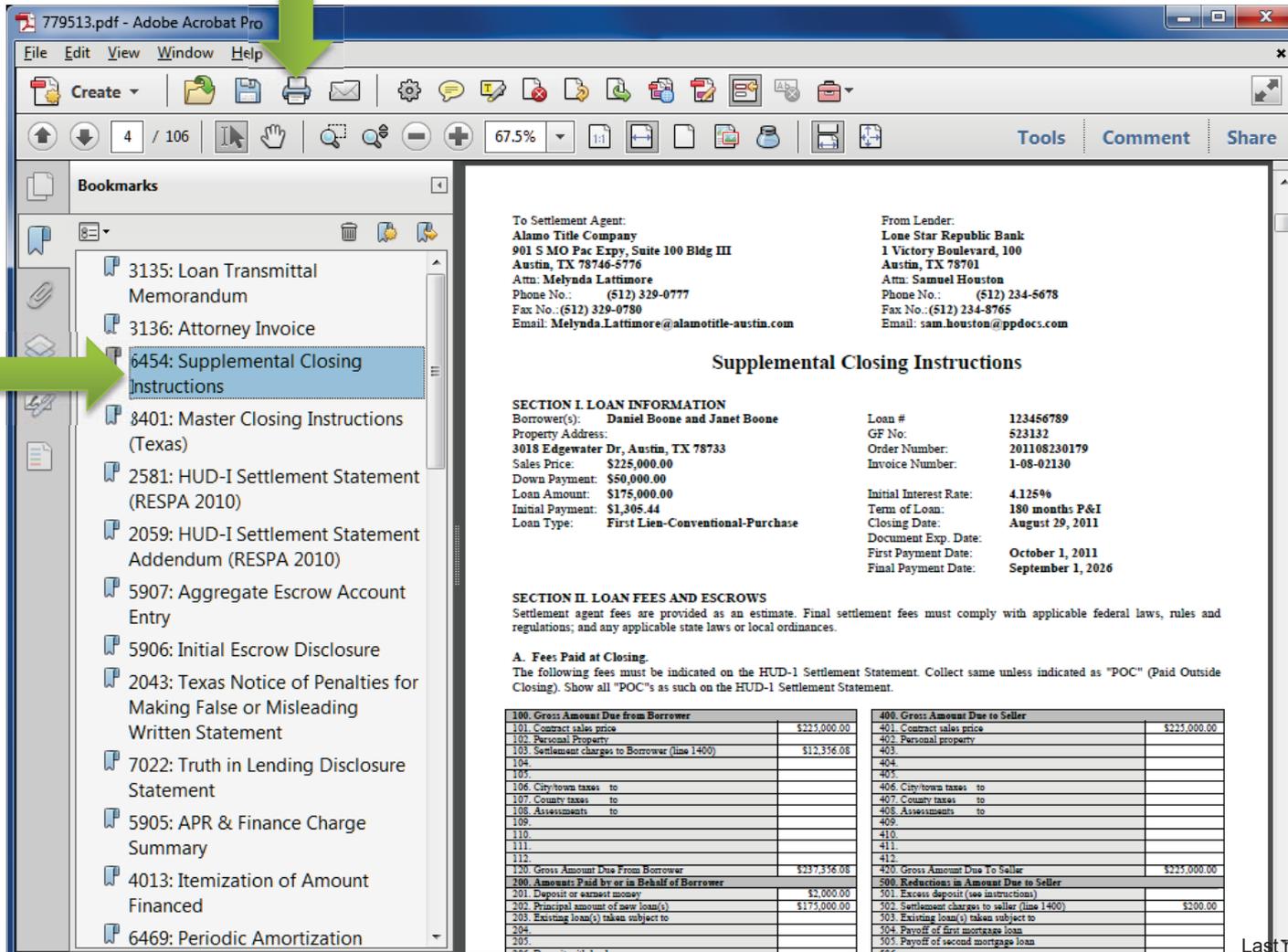
If you approve this document package, you may forward this e-mail to the Settlement Agent or any other party as needed.

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Receiving Documents

The PDF document is bookmarked so that you can jump to any document in the package. Simply click on a bookmark on the left. Use the print button at the top to send the document to your printer.



The screenshot shows the Adobe Acrobat Pro interface. The main window displays a PDF document titled "779513.pdf". The left sidebar contains a "Bookmarks" panel with a list of document pages. The page "6454: Supplemental Closing Instructions" is selected and highlighted in blue. A green arrow points to this bookmark. Another green arrow points to the print icon in the top toolbar. The main content area shows the text of the "Supplemental Closing Instructions" document, including contact information for the settlement agent and lender, and sections for loan information and fees.

To Settlement Agent:
Alamo Title Company
901 S MO Pac Expy, Suite 100 Bldg III
Austin, TX 78746-5776
Attn: Melynda Lattimore
Phone No.: (512) 329-0777
Fax No.: (512) 329-0780
Email: Melynda.Lattimore@alamotitle-austin.com

From Lender:
Lone Star Republic Bank
1 Victory Boulevard, 100
Austin, TX 78701
Attn: Samuel Houston
Phone No.: (512) 234-5678
Fax No.: (512) 234-8765
Email: sam.houston@ppdocs.com

Supplemental Closing Instructions

SECTION I. LOAN INFORMATION

Borrower(s):	Daniel Boone and Janet Boone	Loan #	123456789
Property Address:	3018 Edgewater Dr, Austin, TX 78733	GF No:	523132
Sales Price:	\$225,000.00	Order Number:	201108230179
Down Payment:	\$50,000.00	Invoice Number:	1-08-02130
Loan Amount:	\$175,000.00	Initial Interest Rate:	4.125%
Initial Payment:	\$1,305.44	Term of Loan:	180 months P&I
Loan Type:	First Lien-Conventional-Purchase	Closing Date:	August 29, 2011
		Document Exp. Date:	
		First Payment Date:	October 1, 2011
		Final Payment Date:	September 1, 2026

SECTION II. LOAN FEES AND ESCROWS

Settlement agent fees are provided as an estimate. Final settlement fees must comply with applicable federal laws, rules and regulations; and any applicable state laws or local ordinances.

A. Fees Paid at Closing.
The following fees must be indicated on the HUD-1 Settlement Statement. Collect same unless indicated as "POC" (Paid Outside Closing). Show all "POC"s as such on the HUD-1 Settlement Statement.

100. Gross Amount Due from Borrower		400. Gross Amount Due to Seller	
101. Contract sales price	\$225,000.00	401. Contract sales price	\$225,000.00
102. Personal property		402. Personal property	
103. Settlement charges to Borrower (line 1400)	\$12,376.08	403.	
104.		404.	
105.		405.	
106. City/town taxes to		406. City/town taxes to	
107. County taxes to		407. County taxes to	
108. Assessments to		408. Assessments to	
109.		409.	
110.		410.	
111.		411.	
112.		412.	
120. Gross Amount Due From Borrower	\$237,376.08	420. Gross Amount Due To Seller	\$225,000.00
200. Amounts Paid by or in Behalf of Borrower		500. Reductions in Amount Due to Seller	
201. Deposit or earnest money	\$2,000.00	501. Excess deposit (see instructions)	
202. Principal amount of new loan(s)	\$175,000.00	502. Settlement charges to seller (line 1400)	\$200.00
203. Existing loan(s) taken subject to		503. Existing loan(s) taken subject to	
204.		504. Payoff of first mortgage loan	
205.		505. Payoff of second mortgage loan	
206.		506.	

Receiving Documents

You can always access any document package produced for an order by scrolling down to the Packages section on the “**Loan Information**” screen. Click on the “**Package**” link to see the content of the package, all deliveries associated with that package, and to download the PDF file.

Selected Product

Residential Mortgage
Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Express
Fee: \$0.00

[Open Order Form](#) > [Import Data](#) > [Export Data](#) > [View Data](#) > [Print Summaries](#) >
[Clone Order](#) > [Create Template](#) > [Send Copy](#) > [Archive Order](#) > [Fax Cover Sheet](#) >

Order Status

Order Number:	201207230127 (Cancel Order...)
Time Received:	7/23/2012 11:56:29 AM
Time Needed:	7/23/2012 11:56:29 AM
Status:	Released
Operator:	<input type="radio"/> merlin

Packages

Package	Size	Deliveries	Pages	Date
 Package	131 KB	0	8	7/23/2012 11:56:40 AM

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attorneys at law

That completes the
Document Ordering Guide
Thank you for your business!

