

# Summary of Services

## Purchases:

1. Identify **listing agents** name, company, email and contact information for LSR's (Loan Status Reports)
2. Identify **selling agents** name, company, email and contact information for LSR's (Loan Status Reports)
3. Identify title company or Attorney **closing coordinator** name, as applicable, escrow company, emails and contact information for LSR's (Loan Status Reports)
4. Identify home inspection, wind mitigation, four point and related inspections results
5. Identify Investor loan program and type: Program description, registration/rate lock code, loan term, fixed or adjustable rate, etc.
6. Review Lock confirmation for accuracy: program, pricing, loan amount, appraised value, name spellings, property address, expiration date, Lender or borrower paid, broker comp figure., etc.
7. Order, review, approve and submit appraisal and related information
8. Order, review, approve and submit pest inspection to realtor(s) and borrowers (VA loans)
9. Order, review, approve and submit Title Commitment, CPL, wiring instructions, E & O insurance, preliminary Closing Disclosure, request Realtor addresses, licensure data, etc.
10. Order, review, approve and submit homeowners, wind and/or flood insurance, including elevation certificates when required.
11. Order, review, approve and submit related verifications i.e. VOE, VOR, VOM, Verification of (lifetime) Pension benefits, etc.
12. Order, review, approve and submit requested credit related updates/supplements
13. Order, review, approve and submit Flood certifications and disclosures
14. Review the signed & dated loan application, Loan Estimate and all related loan program disclosures for accuracy and completeness
15. Complete required hand written (wet signature) documentation and Processors certifications as applicable
16. Review, approve and submit fully executed purchase agreement and all related addendums and/or disclosures, identify closing date, escrow deposit(s), seller concessions, mail away, Trust Docs, short sale, etc.
17. Notarize documents if requested
18. Submit comprehensive, accurate loan packages per Investor requirements for minimal conditions
19. Clear all applicable loan conditions and obtain any further required documentation. Communicate with broker and underwriter when necessary

(continued)

20. Update all related third parties throughout the loan process via Loan Status Reports (if requested).
21. Prepare & submit closing document requests for MLO review & approval
22. Ensure closing docs are provided in a timely manner, LE is approved & acknowledged by all parties and closing instructions are sent
23. If requested, schedule and coordinate closing with all related third parties’\*

\*A1 may assist with this function if requested, but our belief is that it is in the best interest for the Originator to coordinate and congratulate borrower(s) and realtor(s) for a timely and efficient closing.

A1 can customize services to your individual or corporate needs and requirements. Our goal is to exceed your loan processing expectations.

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*Have an A1 Mortgage Day!*