Type of Loan Request												
□ New Request   □ Renewal   □ CIT   □ Other									_			
						ION REQ		•				
	s CUN	MBI Serv	<mark>/icing tl</mark>	his lo	an? Yes	s or N	<mark>о</mark>	(check o	<mark>one)</mark>			
Loan Details:								<u> </u>				
Credit Union:		Loan N	0:		Loan	Officer:			LO Title:			
Existing Borrower:  Yes	□ N	0	Borrowe	r Nam	e:			Mem	ber Busine	ess Ln?:	☐ Ye	s 🗌 No
Loan Type:	Closing Date: Time of Closing: Ln Amount: \$ Pymt Due Day:						ay:					
1 <sup>st</sup> Payment:	Maturit	ty Date:		Payr	nent Fre	quency:			Term:		Amo	rt:
Interest Calc: Select One	ı	Payment	Туре:			Paymen	t Amo	ount: \$		Initial F	Rate:	%
	İr	ndex: <b>Sel</b>	ect One									
Fixed Adjustable	If Oth	er:			Margin:			Floor:		Ce	iling:	
Change Frequency: Select	t One		1st Cha	ange D	ate:		If ra	te change	es, change	paymer	nt: <b>Sele</b>	ct One
Prepayment: Select One	Grad	e Days:		Late (	Charge:	%	E	Billing Met	hod: ACH	(Attach	form fo	r ACH)
Purpose Description:												
Comments:												
Is this a Line of Credit	? If ye	s, how	much w	ill be	disbur	sed at cl	osin	g? \$				
Fees:	_											
☐ Accrued Interest Payable To:									☐ Paid	by Borr	Amo	unt:
Appraisal Payable To:		Financed	– Add to	Loan	☐ Fin	anced – Ta	ake fro	om Loan	☐ Paid	by Borr	Amo	unt:
Environmental Payable To:		Financed	– Add to	Loan	☐ Fin	anced – Ta	ake fro	om Loan	☐ Paid	by Borr	Amoi	unt:
☐ Flood Search		Financed	– Add to	Loan	│	anced – Ta	ake fro	om Loan	☐ Paid	by Borr	Amo	unt:
Payable To:		Financed	– Add to	Loan	☐ Fin	anced – Ta	ake fro	om Loan		by Borr	Amo	unt:
Payable To:  UCC Filing		Financed	– Add to	Loan	☐ Fin	anced – Ta	ake fro	om Loan	☐ Paid	by Borr	Amoi	unt:
Payable To:		Financed	– Add to	Loan	│ ☐ Fin	anced – Ta	ake fro	om Loan	☐ Paid	by Borr	Amoi	unt:
Payable To:  Origination	+	Financed	– Add to	Loan	│	anced – Ta	ake fro	om Loan		by Borr	Amo	unt:
Payable To:  Underwriting		Financed				anced – Ta				by Borr	Amo	
Payable To:  Doc Prep	_	Financed				anced – Ta				by Borr	Amo	unt:
Payable To:  Title Policy/Search		Financed				anced – Ta				by Borr	Amoi	
Payable To:  Recording		Financed			<u> </u>	anced – Ta				by Borr	Amoi	
Payable To:  Vehicle Lien	+	Financed				anced – Ta				by Borr	Amo	unt:
Payable To:  Mortgage Registration Tax	,   _	Financed				anced – Ta				by Borr	Amo	unt:
Payable To:		Financed			<u> </u>	anced – Ta				by Borr	Amo	unt:
Payable To:												
		DSC	R Y	<del></del>		_	l					
CUMBI Use Only Reviewed w/ changes Reviewed w/ NO changes												
Questions:												
Questions.												
Laser Pro #:		<del></del>			D	rafted By:			<del></del>			
Reviewed by					_ Da	ate						

Real Estate	Colla	teral l	<b>Detail</b>	<mark>s:</mark>									
Collateral #:	T	Type: Select One				Street Address:				City:			
State:	Zip:	: County:				Lien Position:			File UCC? ☐ Yes ☐ No Select One				
RE Type: Owner:				# Units: # Bui		Buildings:	Flood Cert ID:		Determination Date:				
Flood Ins Required: # Parcels:			Parcel ID:				Property Taxes Paid Through:		Escrow: Yes No (Attach escrow form if "Yes")				
Hazard Insura	nce Ar	nt: <b>\$</b>		Insurance Agent information:									
Real Estate	Colla	toral	Dotail	<u> </u>									
Collateral #:			elect O				reet Addre	ess:				City:	
State:	Zip:		Coun	ty:	l is			en Position:			e UCC?  Yes  No		
RE Type:		Owne	7r.		# Units:	#	Buildings:	Flood Cert ID:			Select One Determination Date:		
Flood Ins Req	uired:	# Par	1	Parce	l ID:			Property T Through:	erty Taxes Paid ugh:			Escrow: Yes No (Attach escrow form if "Yes")	
Hazard Insura	nce Ar	nt: <b>\$</b>		Insu	rance Agent	info	ormation:					,	
Deal Fatata	0 - 11 -	4 1 1	D - 1 - "I	_									
Real Estate Collateral Details:  Collateral #: Type: Select One St					reet Addre	ress: City:				City:			
State: Zip: County:				Lien Position: File UCC			UCC	?  Yes  No					
RE Type:		Owne	ir.		# Units:	#	 Buildings:	Flood Co	ert ID:			elect One etermination Date:	
Flood Inc Poquired: # Parcele:		Parce	Parcel ID:			Through: (At			(Attac	ow: Yes No			
			Insu	Insurance Agent information: "Yes")					)				
Vehicle/Eau	·!······	- 1/CD	CA C	<u>- 11 - 4 - </u>	wal Datail								
Vehicle/Equi			elect O		Valuation Source:			Source:	File UCC?  Yes  No				
Year:		Make			Model:	VIN/Serial #:					Select One		
			). 	Inqui		<u> </u>			nments:				
Hazard Insura	ince Ai	п. Ф		IIISU	rance Agent	ш	omation.		Con	imenis.			
Vehicle/Equ	<mark>ipme</mark>	nt/GB	SA C	ollate	eral Detail	s:							
Collateral #: Type: Select One				Valuation Source:				File UCC?  Yes  No					
			Model:	VINI/Cori			Select One						
Year: Make: Hazard Insurance Amt: \$					VIN/Serial #:		l	Comments:					
TIGZGIG IIISUIG	Hazard Insurance Amt: \$ Insurance Agent information: Comments:												
Vehicle/Equ	<mark>ipme</mark>	nt/GB	SA C	ollate	ral Detail	s:							
Collateral #: Type: Select One				Valuation Source:				File UCC? ☐ Yes ☐ No					
Year:		Make			Model:			VIN/Seri	al #·			Select One	
	nco ^-		•	Inc		int	orm eties:	viiv/Seri					
Hazard Insura	Hazard Insurance Amt: \$ Insurance Agent information: Comments:												

Attach additional collateral information via Addendum

Comments:

## **Borrowers:**

(If the Borrower/Guarantor is in WI, please provide the spouses name, address, birthdate and social security # in the comments section. It only needs to be provided if the Spouse will not be a Borrower/Guarantor on the loan)

Borrower 1:		TIN or EIN:					
Borrower Type:	ndividual	or 🗌 DBA	DBA Partnership LLC		☐ Corporation ☐ Trust		
Street Address:	eet Address: Mailing Address:			Authorized chment if more needed)	# of Signatures Required on docs:		
Authorized Signer Nam	ne:	Title:	l		☐ Signing documents?		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Borrower 2:				TIN or EIN:			
Borrower Type:	ndividual 🔲 Sole Proprieto	or 🗌 DBA	Partne	rship  LLC	☐ Corporation ☐ Trust		
Street Address:	Street Address: Mailing Address:			Authorized chment if more needed)	# of Signatures Required on docs:		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Comments:  Guarantors:  (If the Borrower/Guarantor is in WI, please provide the spouses name, address, birthdate and social security # in the comments section. It only needs to be provided if the Spouse will not be a Borrower/Guarantor on the loan)							
Guarantor 1:				TIN or EIN:			
Guarantor Type:	ndividual Sole Propriet	or 🗌 DBA	☐ Partne	ership 🗌 LLC	☐ Corporation ☐ Trust		
Street Address:		Signers:	hment if more	# of Signatures Required on docs:			
Authorized Signer Nam	ne:	Title:	•		☐ Signing documents?		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Authorized Signer Nam	Title:			☐ Signing documents?			
Guarantor 2:				TIN or EIN:			
Guarantor Type:   I	ndividual   Sole Propriet	or 🗌 DBA	☐ Partne	ership 🗌 LLC	☐ Corporation ☐ Trust		
Street Address:		Signers:	Authorized chment if more needed)	# of Signatures Required on docs:			
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Authorized Signer Nam		Title:			☐ Signing documents?		
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Guarantor 3:				TIN or EIN:			
Guarantor Type:	ndividual	or DBA	☐ Partne	ership  LLC	☐ Corporation ☐ Trust		
Street Address:		Total # of Authorized Signers: (add attachment if more lines are needed)		# of Signatures Required on docs:			
Authorized Signer Nam	ne:	Title:			☐ Signing documents?		
Authorized Signer Nam		Title:			☐ Signing documents?		
Authorized Signer Nam	Title:			☐ Signing documents?			

### Attach additional Borrower/Guarantor information via Addendum

Comments:

#### **Financial Reporting Requirements:**

Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):
Borrower #:	Type: Select One	Frequency:	Due (# days after stmt date):

Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):
Guarantor #:	Type: Select One	Frequency:	Due (# days after stmt date):

Comments:

#### Questions:

1. Where is the loan closing?:   At Credit Union   At Title Company   At Attorney's Office							
☐ At CU Member Business, Inc ☐ At Other:							
2. Name of Closing Agent?: At Credit Union:	At Title Company:	At Attorney:					
At CU Member Business, Inc.: At Other:							
3. Who is responsible for recording of applicable closing documents?:							
☐ Credit Union ☐ Title Company ☐ Attorney's Office ☐ CU Member Business, Inc ☐ Other:							
Exceptions (i.e. Secretary of State UCC Filing?):							

# Additional Documents to Provide (if available):

- 1. Title Commitment/Owners & Encumbrance Report
- 2. Proof of VIN (via Purchase Agreement or Title)
- 3. Flood Certificate
- 4. Corporate Documents
- 5. Trust Documents