



CHECKLIST FOR SETTING UP AN ACCOUNT

Needed To Set Up Account

- o Principal Balance
- o Monthly principal and interest amount (monthly payment)
- o Interest % (if it applies to your contract)
- o First payment date and monthly payment date thereafter
- o Contract call date (if that applies to your contract)
- o Who pays our service fees (if not specified, seller is responsible)
- o Current contact information of all parties on REC (Phone numbers emails and mailing addresses to receive Welcome Packets)
- o Current mortgage statement (if it applies to your contract)
- o Tax bill and insurance policy (if it applies to your contract)

For a Real Estate Contract, we need at least one copy of the REC and original deeds.

For a Mortgage Note, we need a copy of the Note/Mortgage and the original Release of Mortgage.

For a Promissory Note, we can set the account up with a copy of the note and deed of trust (if it applied to your note)

For a Lease, we need a copy of the Lease Agreement

WE DO NOT OPEN AN ACCOUNT USING A PURCHASE AGREEMENT.