

## Requirements

Loan must be at the **Approved** milestone and the **Rate** must to be **Locked**.

### Status

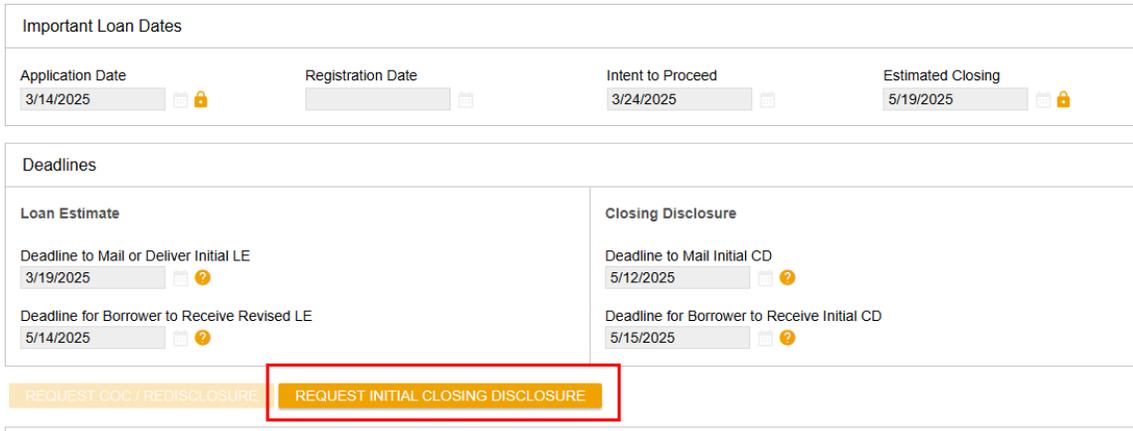


### Agents

- Status and Agents
- Application Information
- Closing Costs
- Loan Information
- Rate Lock **
- Disclosures
- E-docs
- Conditions (0)
- Order Services

**STEP 1:** Ensure all the requirements above have been met, then select the **Disclosures** screen.

**STEP 2:** Select the **REQUEST INITIAL CLOSING DISCLOSURE** option.



Important Loan Dates			
Application Date	Registration Date	Intent to Proceed	Estimated Closing
3/14/2025		3/24/2025	5/19/2025

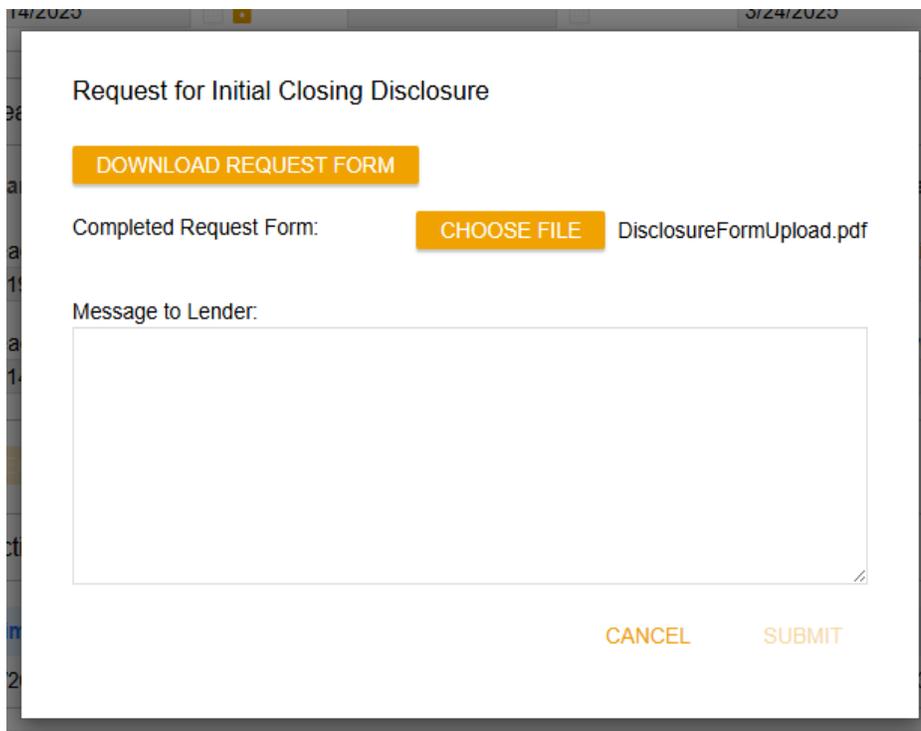
  

Deadlines	
<b>Loan Estimate</b>	<b>Closing Disclosure</b>
Deadline to Mail or Deliver Initial LE	Deadline to Mail Initial CD
3/19/2025	5/12/2025
Deadline for Borrower to Receive Revised LE	Deadline for Borrower to Receive Initial CD
5/14/2025	5/15/2025

REQUEST COC / REDISCLOSURE    **REQUEST INITIAL CLOSING DISCLOSURE**

**STEP 3:** **Download** and **complete** the Request Form. Then **upload** the completed Request Form submit the request.

**Note:** If you receive an error message stating, *“File is currently in review. If you are uploading an ICD Request Form, please contact your Account Manager,”* your loan may not be in an eligible status for portal upload. In this case, please email the completed form directly to your Account Manager.



Request for Initial Closing Disclosure

[DOWNLOAD REQUEST FORM](#)

Completed Request Form: [CHOOSE FILE](#) DisclosureFormUpload.pdf

Message to Lender:

[CANCEL](#)    [SUBMIT](#)

# REQUESTING INITIAL CLOSING DISCLOSURES

<b>Loan Number:</b> ICD REQUEST TESTER		<b>Loan Information</b>		
Interest Rate: 6.000	Rate Lock Exp.: 5/19/2025	Closing Date: 5/19/2025	1 <sup>st</sup> Payment: 7/1/2025	Preview Initial CD? <input type="checkbox"/> Yes <input type="checkbox"/> No
Loan Amount: 450,000.00	Purchase Price: 600,000.00	Appraised Value: 600,000.00	Loan Program: TEST PROGRAM NAME	
Loan Purpose: Select One	Prepayment Penalty: Select One	Property Type:	PUD or Condo Name:	
Impounds*: <input type="checkbox"/> Yes <input type="checkbox"/> No	Escrow Holdback: <input type="checkbox"/> Yes <input type="checkbox"/> No	POA? <input type="checkbox"/> Yes <input type="checkbox"/> No	POA Name:	
<b>*All HPML loans require impounds. Properties in a Flood Zone are ineligible for impound waivers.</b>				
<b>Borrower Information</b>				
Borrower Name: ALICE FIRSTIMER		Co-Borrower Name		
Borrower Email: TEST@AMERITRUST-MORTGAGE.COM		Co-Borrower Email:		
<b>Vesting Information (LIST ALL INDIVIDUALS WHO WILL HOLD TITLE AS THEIR NAMES SHOULD APPEAR)</b>				
Name:		Vesting:		
Name:				
Name:		Entity Vesting (if applicable):		
Name:				
Non-Purchasing Spouse (if applicable):				
Closing in Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No		Attorney Opinion Letter Exists? (if closing in a Trust) Select One		
<b>Fee Details</b>				
Lender Paid Compensation	\$	Appraisal Fee (Invoice Required)		\$
Borrower Paid Compensation	\$	POC <input type="checkbox"/> Yes <input type="checkbox"/> No		
Discount Fee	%	Bkr Reimbursed <input type="checkbox"/> Yes <input type="checkbox"/> No		
Lender Buyout Fee Exists? <input type="checkbox"/> Yes <input type="checkbox"/> No		2 <sup>nd</sup> Appraisal Fee (Invoice Required)		\$
Seller Credit	\$	POC <input type="checkbox"/> Yes <input type="checkbox"/> No		
Lender Credit	\$	Bkr Reimbursed <input type="checkbox"/> Yes <input type="checkbox"/> No		
Other Credit Description:	\$	Credit Report Fee (Invoice Required)		\$
		POC <input type="checkbox"/> Yes <input type="checkbox"/> No		
Other Fee:	\$	Bkr Reimbursed <input type="checkbox"/> Yes <input type="checkbox"/> No		
Other Fee:	\$	3 <sup>rd</sup> Party Processing Fee (Invoice Required)		\$
	<b>Real Estate Broker(B)</b>	<b>Real Estate Broker(S)</b>	<b>Title/Settlement</b>	<b>Escrow</b>
<b>Company Name:</b>				
<b>Company License #:</b>				
<b>Agent Name:</b>				
<b>Agent License #:</b>				
<b>Email:</b>				
<b>Phone:</b>				
<b>Email for Closing Documents (if different):</b>				
<b>Notes to Closer:</b>				
<b>Required:</b>				
• Locked LE Sent	• Tax Cert or Equivalent	• Est Prelim CD or Settlement Stmtnt		
• Hazard Ins dec page or quote	• Title Commitment and ICPL	• Current Payoff Demand (if applicable)		
• Flood Ins dec page or quote	• 3 <sup>rd</sup> Party Invoices (Processing, Credit, etc)	• Complete Vesting		

**\*\*RE-DRAW FEE OF \$150 WILL BE APPLIED FOR ANY CHANGES AFTER DOCS HAVE BEEN ISSUED\*\***

*This PDF form will be a fillable form.*

*Make sure to fill out the information correctly and confirm the fee values and vesting information.*

**Note:** *The form only fills in the primary application's borrower and co-borrower information. You can download an empty fillable form from the portal or website.*