

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.

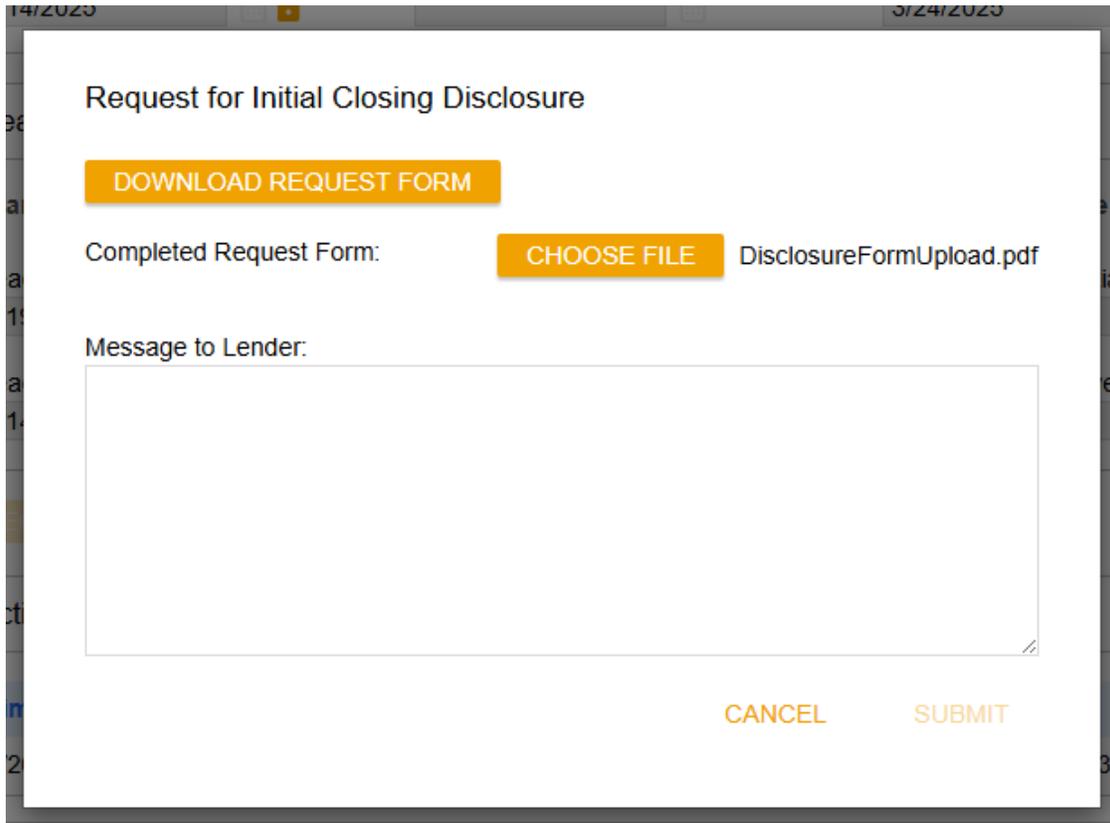
STEP 2: Select the **REQUEST INITIAL CLOSING DISCLOSURE** option.

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

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



Request for Initial Closing Disclosure

[DOWNLOAD REQUEST FORM](#)

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

Message to Lender:

[CANCEL](#) [SUBMIT](#)



REQUESTING INITIAL CLOSING DISCLOSURES

Loan Number: ICD REQUEST TESTER		Loan Information		
Interest Rate: 6.000	Rate Lock Exp.: 5/19/2025	Closing Date: 5/19/2025	1 st 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:	
*All HPML loans require impounds. Properties in a Flood Zone are ineligible for impound waivers.				
Borrower Information				
Borrower Name: ALICE FIRSTIMER		Co-Borrower Name		
Borrower Email: TEST@AMERITRUST-MORTGAGE.COM		Co-Borrower Email:		
Vesting Information (LIST ALL INDIVIDUALS WHO WILL HOLD TITLE AS THEIR NAMES SHOULD APPEAR)				
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		
Fee Details				
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 nd 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	\$	Credit Report Fee (Invoice Required)		\$
Description:		POC <input type="checkbox"/> Yes <input type="checkbox"/> No		
Other Fee:	\$	Bkr Reimbursed <input type="checkbox"/> Yes <input type="checkbox"/> No		
Other Fee:	\$	3 rd Party Processing Fee (Invoice Required)		\$
	Real Estate Broker(B)	Real Estate Broker(S)	Title/Settlement	Escrow
Company Name:				
Company License #:				
Agent Name:				
Agent License #:				
Email:				
Phone:				
Email for Closing Documents (If different):				
Notes to Closer:				
Required:				
• Locked LE Sent	• Tax Cert or Equivalent		• Est Prelim CD or Settlement Stmt	
• Hazard Ins dec page or quote	• Title Commitment and ICPL		• Current Payoff Demand (If applicable)	
• Flood Ins dec page or quote	• 3 rd 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.