

DOCUMENT ORDER WORKSHEET CALIFORNIA DOCUMENTS PRODUCTION ONLY

**YOUR COMPLETED DOC ORDER SUBMISSION IS TO BE SENT IN ONE EMAIL TO:
DOCS@PLMWEB.COM FOR REVIEW**

**PLEASE COMPLETE THIS FORM ACCURATELY TO ENSURE THAT THE DOCUMENTS FOR THE PROPOSED LOAN ARE
DRAWN CORRECTLY TO AVOID ANY REDRAW FEES.**

TO ORDER DOCUMENTS, PLM WILL NEED THE FOLLOWING:

- 1) **THIS FORM COMPLETED AND SIGNED (MASTER CLIENT AGREEMENT EITHER ACCOMPANYING THIS OR ALREADY ON FILE WITH PLM)**
- 2) **PRELIMINARY TITLE REPORT(S) DATED WITHIN THE LAST 90 DAYS FOR ALL SUBJECT PROPERTY(IES)**
- 3) **BORROWER(S) LOAN APPLICATION(S)**

TYPE OF DOCUMENTS REQUESTED	RESIDENTIAL (1-4 UNITS): ____ FIXED RATE ____ STEP RATE ____ HELOC BRIDGE LOAN: YES ____ NO ____ COMMERCIAL (MORE THAN 4 UNITS, APARTMENTS, MIXED USE, WAREHOUSE, WINERY, ETC.): ____ FIXED RATE ____ STEP RATE ____ HELOC LAND: ____ FIXED RATE ____ STEP RATE ____ HELOC
TYPE OF TRANSACTION	____ PURCHASE ____ REFINANCE ____ REFI BUT WITH TITLE CHANGE
CLIENT TYPE	____ REAL ESTATE BROKER LICENSED ____ CALIFORNIA FINANCE LENDER
CLIENT INFORMATION	COMPANY – NAME MUST MATCH DRE/CFL INFORMATION EXACTLY: _____ ADDRESS _____ PHONE# _____ FAX# _____ DRE OR CFL LICENSE NUMBER _____ NMLS ENDORSEMENT NUMBER _____ COUNTY IN WHICH YOUR OFFICE IS LOCATED _____
COMPANY REPRESENTATIVE FOR BORROWER DISCLOSURES	NAME – (MUST MATCH DRE/DOC INFORMATION EXACTLY) _____ DRE/DOC# _____ NMLS ENDORSEMENT NUMBER _____

<p>COMPANY REPRESENTATIVE FOR LENDER DISCLOSURES (IF DIFFERENT THAN ABOVE)</p>	<p>NAME – (MUST MATCH DRE/DOC INFORMATION EXACTLY)</p> <p>_____</p> <p>DRE/DOC# _____ NMLS ENDORSEMENT NUMBER _____</p>
<p>DOES YOUR COMPANY ADVERTISE A DIRECT LENDER OR A COMPANY WHO WILL FUND WITH OTHER’S MONEY?</p>	<p>PLEASE CHECK MARK CORRECT ANSWER</p> <p>_____ ADVERTISE AS A DIRECT LENDER (WILL ONLY USE YOUR MONEY)</p> <p>_____ ADVERTISE AS A BROKER (MAY/WILL USE OTHER’S MONEY)</p> <p>THIS IS IMPORTANT AS IT WILL DEFINE YOU AS A FIDUCIARY. IF YOU ADVERTISE THAT YOU WILL “BROKER” THE LOAN BUT END UP USING YOUR OWN MONEY, YOU ARE STILL A FIDUCIARY OF THE BORROWER.</p> <p>IF YOU ARE DIRECT LENDER AND ADVERTISE AS SUCH, ANY DOCUMENT IN THE LOAN PACKAGE WHICH REFERS TO YOU AS A “FIDUCIARY” OF THE BORROWER SHOULD BE REMOVED.</p>
<p>IF YOU ARE PAYING A COOPERATING BROKER THROUGH ESCROW, WE NEED THEIR INFORMATION:</p>	<p>NAME OF BROKER(AGE) TO BE PAID: _____</p> <p>DRE LICENSE NUMBER _____</p> <p>NMLS ENDORSEMENT NUMBER _____</p> <p>THE NAME OF THEIR REPRESENTATIVE:</p> <p>_____</p> <p>DRE/DOC# _____ NMLS ENDORSEMENT NUMBER _____</p>
<p>BORROWER FULL NAME AS ON TITLE (OR TO BE VESTED) – AN INDIVIDUAL</p>	
<p>CO-BORROWER FULL NAME AS ON TITLE (OR TO BE VESTED) – AN INDIVIDUAL</p>	
<p>VESTING (HUSBAND AND WIFE, AS JOINT TENANTS, SEE PRELIM, ETC.)</p>	<p>_____ AS ON PRELIM (ONLY ON REFI)</p> <p>_____ HUSBAND AND WIFE, AS JOINT TENANTS</p> <p>_____ HUSBAND AND WIFE, AS JOINT TENANTS, WITH RIGHT OF SURVIVORSHIP</p> <p>_____ HUSBAND AND WIFE, AS COMMUNITY PROPERTY</p> <p>_____ A SINGLE WOMAN</p> <p>_____ A SINGLE MAN</p> <p>_____ A MARRIED WOMAN, AS HER SOLE AND SEPARATE PROPERTY</p> <p>_____ A MARRIED MAN, AS HIS SOLE AND SEPARATE PROPERTY</p> <p>OTHER:</p>
<p>BORROWER’S NAME IF CORPORATION, LLC, LP, TRUST, ETC.</p>	

SIGNOR #1 AND HIS/HER CAPACITY OF SIGNOR FOR ENTITY (PRESIDENT, MANAGING MEMBER, ETC.)	
SIGNOR #2 AND HIS/HER CAPACITY OF SIGNOR FOR ENTITY (PRESIDENT, MANAGING MEMBER, ETC.)	
GUARANTOR #1 FOR LOAN (IF ANY) AND THEIR MAILING ADDRESS	
GUARANTOR #2 FOR LOAN (IF ANY) AND THEIR MAILING ADDRESS	
WHEN ORDERING LENDER DOCS: IF BUSINESS ENTITY, WILL A COPY OF THE BALANCE SHEET AND INCOME STATEMENT BE ATTACHED TO LENDER DOCUMENTS?	YES _____ NO _____ IF YES, DATE OF BALANCE SHEET. _____ INCOME STATEMENT PERIOD (FROM-TO). _____ FINANCIAL STATEMENTS HAVE BEEN AUDITED BY CPA OR PA. YES ____ NO ____ ADDITIONAL INFORMATION IS INCLUDED ON AN ATTACHED ADDENDUM. YES ____ NO ____
MAILING ADDRESS OF BORROWER AFTER THE CLOSE OF THIS TRANSACTION	
DATE LOAN APPLICATION WAS TAKEN – RESPA LOAN ONLY	
PLEASE PROVIDE THE GROSS MONTHLY INCOME AMOUNT QUALIFYING THE BORROWER FOR THIS LOAN	\$ _____ (GROSS MONTHLY INCOME AMOUNT INCLUDES SALARY(IES), BONUS(ES), GROSS RENT, SOCIAL SECURITY, ETC.)
TYPE OF LOAN (MUST BE ONE OR THE OTHER)	BUSINESS PURPOSE _____ OR CONSUMER _____
TRID APR PERCENTAGE (IF THIS IS A CONSUMER LOAN)	_____ %
HAS BORROWER FILED BANKRUPTCY IN THE LAST 12 MONTHS?	YES _____ NO _____
LATE CHARGE TO ACCRUE AFTER THIS NUMBER OF DAYS	10 DAYS _____ 15 DAYS _____
LATE CHARGE PERCENTAGE	4.00% _____ 6.00% _____ 10.00% _____

BALLOON LATE CHARGE FOR 1-4 RESIDENTIAL DWELLINGS ONLY	PLEASE NOTE ON A 1-4 RESIDENTIAL, STANDARD LATE CHARGE LANGUAGE SHALL BE USED. (ONE MONTHLY LATE CHARGE PER MONTH FOR TIME BALLOON REMAINS UNPAID IS THE MAXIMUM ALLOWED)
BALLOON LATE CHARGE FOR COMMERCIAL, BARE LAND AND MULTI-FAMILY DWELLINGS	<p>\$ _____ OR _____%</p> <p>IF SUBJECT PROPERTY(IES) ARE COMMERCIAL, BARE LAND, OR MULTI-FAMILY DWELLINGS AND A PERCENTAGE OF THE LOAN AMOUNT IS BEING CHARGED AS A "PENALTY" OR "LIQUIDATED DAMAGES," PLEASE PROVIDE REASONING FOR WHY THE LENDER IS ENTITLED TO MORE THAN THE STANDARD LATE FEE (TWO MONTHLY LATE CHARGES DUE AT MATURITY, AND ONE MONTHLY LATE CHARGE THEREAFTER FOR TIME BALLOON PAYMENT REMAINS UNPAID):</p> <p>REASON FOR NONSTANDARD COMMERCIAL, BARE LAND, OR MULTI-FAMILY DWELLING LATE CHARGE (THIS WILL BE INCLUDED IN YOUR PROMISSORY NOTE):</p>
DEFAULT INTEREST	<p>AMOUNT TO BE ADDED ON AS DEFAULT INTEREST: _____%</p> <p>TOTAL OF DEFAULT INTEREST AND NOTE RATE INTEREST: _____%</p>
PREPAYMENT PENALTY	<p>LENGTH OF PENALTY (IN MONTHS) : _____</p> <p>BASED ON ORIGINAL PRINCIPAL: YES _____ NO _____ OR</p> <p>BASED ON OUTSTANDING PRINCIPAL: YES _____ NO _____</p> <p>BASED ON _____80% _____100% OF PRINCIPAL</p> <p>NO. OF MONTHS OF PENALTY: _____</p> <p>HELOCS – EARLY CLOSURE FEE: YES _____ NO _____</p> <p>FLAT AMOUNT - \$ _____ OR</p> <p>GUARANTEED MONTHS OF INTEREST _____</p>
WILL THIS LOAN BE ASSUMABLE?	YES _____ NO _____
RESTRICTIONS OF ASSUMABILITY	
NAME OF TRUSTEE ON DEED OF TRUST	<p>_____ PLM LOAN MANAGEMENT SERVICES, INC. (WHEN PLM IS SERVICING THE LOAN)</p> <p>_____ INSURING TITLE COMPANY</p> <p>_____ THIRD PARTY SERVICE NAME: _____</p> <p>_____ ORIGINATING BROKER</p> <p>_____ OTHER: _____</p>

PROPERTY # 1 ADDRESS	
INTENDED TO BE OWNER OCCUPIED	YES _____ NO _____
POSITION OF YOUR NEW LOAN	_____ 1 ST _____ 2 ND _____ 3 RD
TYPE & SPECS OF PROPERTY	SFR _____ CONDO _____ DUPLEX _____ TRIPLEX _____ FOURPLEX _____ MULTI-UNIT (MORE THAN 4) _____ BARE LAND _____ COMMERCIAL _____ MIXED USE (DESCRIBE) _____ OTHER (DESCRIBE) _____ SQ. FEET _____ AGE _____ CONSTRUCTION TYPE (WOOD FRAME, CINDER BLOCK, ETC.) _____
IF YOUR LOAN IS NOT A FIRST DEED OF TRUST, INFORMATION ON REMAINING UNDERLYING	PRINCIPAL BALANCE: _____ INTEREST RATE: _____ MATURITY DATE: _____ BALLOON PAYMENT AMOUNT: _____ PAYMENT AMOUNT: _____ CURRENT LENDER NAME: _____
IF YOUR LOAN IS A FIRST BUT A NEW JUNIOR LIEN IS BEING RECORDED CONCURRENTLY OR AN EXISTING LOAN IS SUBORDINATING	NEW JUNIOR LOAN: YES _____ NO _____ EXISTING LOAN SUBORDINATING: YES _____ NO _____ PRINCIPAL BALANCE: _____ INTEREST RATE: _____ MATURITY DATE: _____ BALLOON PAYMENT AMOUNT: _____ PAYMENT AMOUNT: _____ CURRENT LENDER NAME: _____
VALUE OF PROPERTY #1	APPRAISED VALUE: \$ _____ BROKER VALUE: \$ _____ PURCHASE PRICE: \$ _____ COMPLETION VALUE: \$ _____ (CAN ONLY BE USED IF CONSTRUCTION FUNDS ARE BEING HELD FOR REHAB/CONSTRUCTION AND ALL DRE RULES ARE TO BE FOLLOWED)
NAME OF APPRAISER FOR PROPERTY #1	NAME: _____ COMPANY: _____ FULL ADDRESS: _____ DATE OF APPRAISAL: _____ RELATIONSHIP TO BROKER: _____
PROPERTY #2 ADDRESS	

INTENDED TO BE OWNER OCCUPIED	YES _____ NO _____
POSITION OF YOUR NEW LOAN	_____ 1 ST _____ 2 ND _____ 3 RD
TYPE & SPECS OF PROPERTY	SFR _____ CONDO _____ DUPLEX _____ TRIPLEX _____ FOURPLEX _____ MULTI-UNIT (MORE THAN 4) _____ BARE LAND _____ COMMERCIAL _____ MIXED USE (DESCRIBE) _____ OTHER (DESCRIBE) _____ SQ. FEET _____ AGE _____ CONSTRUCTION TYPE (WOOD FRAME, CINDER BLOCK, ETC.) _____
IF YOUR LOAN IS NOT A FIRST DEED OF TRUST, INFORMATION ON REMAINING UNDERLYING	PRINCIPAL BALANCE _____ INTEREST RATE _____ MATURITY DATE _____ BALLOON PAYMENT AMOUNT _____ PAYMENT AMOUNT _____ CURRENT LENDER NAME _____
IF YOUR LOAN IS A FIRST BUT A NEW JUNIOR LIEN IS BEING RECORDED CURRENTLY OR AN EXISTING LOAN IS SUBORDINATING	NEW JUNIOR LOAN: YES ____ NO ____ EXISTING LOAN SUBORDINATING: YES _____ NO _____ PRINCIPAL BALANCE _____ INTEREST RATE _____ MATURITY DATE _____ BALLOON PAYMENT AMOUNT _____ PAYMENT AMOUNT _____ CURRENT LENDER NAME _____
VALUE OF PROPERTY #2	APPRAISED VALUE \$ _____ BROKER VALUE \$ _____ PURCHASE PRICE \$ _____ COMPLETION VALUE \$ _____ (CAN ONLY BE USED IF CONSTRUCTION FUNDS ARE BEING HELD FOR REHAB/CONSTRUCTION AND ALL DRE RULES ARE TO BE FOLLOWED)
NAME OF APPRAISER FOR PROPERTY #2	NAME: _____ COMPANY: _____ FULL ADDRESS: _____ DATE OF APPRAISAL: _____ RELATIONSHIP TO BROKER: _____
WHEN PLM IS PREPARING LENDER DOCS: WHEN REFINANCING PROPERTY, DURING THE LAST 12 MONTHS HAVE ANY PAYMENTS BEEN MORE THAN 60 DAYS LATE?	YES _____ NO _____ IF YES: HOW MANY PAYMENTS WERE MORE THAN 60 DAYS LATE? _____ DO ANY OF THESE PAYMENTS REMAIN UNPAID? _____ WILL LOAN PROCEEDS CURE THE DELINQUENCY? _____ IF NOT, SOURCE OF FUNDS TO CURE DELINQUENCY? _____

<p>SERVICING COMPANY – MAY BE THE LENDER ON A SINGLE INVESTOR LOAN; MUST BE A DRE BROKER IF A MULTI-LENDER LOAN</p>	<p>_____ PLM LENDER SERVICES, INC. _____ LENDER (IF SINGLE INVESTOR) _____ ORIGINATING BROKER _____ THIRD PARTY SERVICER –</p> <p>NAME: _____</p> <p>ADDRESS IF LENDER OR THIRD PARTY LENDER: _____ _____</p> <p>PHONE NO. _____</p> <p>DRE# _____ NMLS ENDORSEMENT NUMBER _____</p> <p>IF THE NAMED ENTITY ABOVE WILL BE THE SUB-SERVICER, NAME OF THE ACTUAL SERVICER: _____</p>
<p>COST OF SERVICING TO LENDER</p>	<p>GROSS AMOUNT OF SERVICING FEE TO BE CHARGED TO LENDER: _____ PERCENT PER _____ MONTH _____ YEAR _____ OR FLAT FEE PER MONTH: \$ _____</p> <p>AMOUNT TO BE PAID TO SUB-SERVICER FROM GROSS AMOUNT OF SERVICING FEE: _____ PERCENT PER _____ MONTH _____ YEAR _____ OR FLAT FEE PER MONTH: \$ _____</p> <p>SERVICING FEE SPLIT: ORIGINATING BROKER _____% SERVICER _____%</p> <p>LATE CHARGE SPLIT: ORIGINATING BROKER _____% LENDER _____% SERVICER _____%</p> <p>PREPAY SPLIT: ORIGINATING BROKER _____% LENDER _____% SERVICER _____%</p> <p>DEFAULT INTEREST SPLIT: ORIGINATING BROKER _____% LENDER _____% SERVICER _____%</p> <p>OTHER: _____ ORIGINATING BROKER _____% LENDER _____% SERVICER _____%</p>
<p>ARE YOU THE BROKER RECEIVING ANY PORTION OF THE SERVICE FEE?</p>	<p>YES _____ NO _____</p>
<p><i>WHEN PLM IS PREPARING LENDER DOCS:</i></p> <p>WILL THE SERVICING AGREEMENT BE INCLUDED IN THE LENDER DOCUMENTS?</p>	<p>YES _____ NO _____</p> <p>IF PLM IS THE SERVICER, A LOAN SERVICING AGREEMENT SHALL TYPICALLY BE INCLUDED IN THE LENDER DOC SET.</p>
<p>WHEN PLM IS PREPARING LENDER DOCS:</p> <p>RELATIONSHIP OF BROKER TO SERVICING AGENT</p>	<p>_____ CONTRACT (BROKER SHALL BE PAID PORTION OF SERVICE FEE) _____ BUSINESS (BROKER IS NOT PAID A PORTION OF THE SERVICING FEE) _____ LENDER CHOICE (BROKER DOES NOT RECEIVE A PORTION OF SERVICE FEE) _____ BROKER IS SERVICER</p>

BROKER CAPACITY	A. AGENT FOR BORROWER ONLY YES _____ NO _____ B. AGENT FOR LENDER ONLY YES _____ NO _____ C. AGENT FOR BORROWER AND LENDER YES _____ NO _____ D. FUNDING A PORTION OF LOAN AS PRINCIPAL YES _____ NO _____ E. PRINCIPAL AS BORROWER OF FUNDS YES _____ NO _____
ESCROW INFORMATION	NAME OF ESCROW COMPANY: _____ ADDRESS OF ESCROW COMPANY: _____ NAME OF ESCROW OFFICER: _____ THEIR ESCROW NO. _____ POLICY TYPE (ALTA, CLTA, ETC.) _____ ENDORSEMENTS: _____ COVERAGE AMOUNT: _____
CANNABIS PROPERTY	Is this property going to be a property that either grows and/or sells cannabis? Yes _____ No _____ If Yes: Tenant occupied? Yes _____ No _____ Owner / user? Yes _____ No _____
LOAN AMOUNT	\$ _____
INTEREST RATE	_____ % IF STEP RATE INTEREST RATE: _____ % FOR _____ MONTHS _____ % FOR _____ MONTHS _____ % FOR _____ MONTHS
NUMBER OF PAYMENTS (INCLUDING BALLOON)	_____ MONTHS _____ MONTHLY _____ QUARTERLY _____ ANNUALLY _____ ACCRUED MONTHLY PAYMENTS ALL DUE AT MATURITY ARE THE PAYMENTS BEING COMPOUNDED? YES _____ OR NO _____ IS THE ODD DAYS INTEREST FROM DATE OF FUNDING TO END OF MONTH BEING CALCULATED BEING PAID AT MATURITY? YES _____ OR NO _____ _____ OTHER
NUMBER OF <u>PREPAID PAYMENTS</u> (PLEASE NOTE: ODD DAYS INTEREST IS ALWAYS COLLECTED AT THE CLOSING OF ESCROW, UNLESS OTHERWISE SPECIFIED)	_____ PREPAID MONTHLY PAYMENTS ALL PAYMENTS TO BE DISBURSED THROUGH ESCROW (THINK OF TAX RAMIFICATIONS) YES _____ NO _____ TO BE PAID AS DEEMED EARNED – IF PLM IS SERVICING, A SECURITY AGREEMENT SHALL BE ENCLOSED WITH BORROWER DOCS. IF PLM IS NOT SERVICING, ORIGINATING BROKER TO PROCURE FROM SERVICER. YES _____ NO _____

LOAN TYPE	<p>_____ INTEREST ONLY</p> <p>_____ PARTIALLY AMORTIZED (WITH BALLOON) TERM (I.E., 30 YEAR DUE IN YEARS, ETC.) _____ YEARS DUE IN _____ MONTHS</p> <p>_____ FULLY AMORTIZED (NO BALLOON PAYMENT)</p>
AMOUNT OF PAYMENT	\$ _____
ESTIMATED FUNDING DATE	
DATE OF FIRST PAYMENT	
IS THIS LOAN IMPOUNDED	<p>YES _____ NO _____</p> <p>INSURANCE: YES _____ NO _____ (IF IMPOUNDED AND INSURANCE IS NOT BEING PAID THROUGH ESCROW, ALTHOUGH IT SHOULD BE, ANNUAL AMOUNT OF INSURANCE PREMIUM \$ _____ FOR CALCULATION AND DATE INSURANCE TO BE PAID)</p> <p>TAXES: YES _____ NO _____</p>
IS THIS LOAN FUNDED PARTIALLY OR TOTALLY BY "BROKER CONTROLLED FUNDS"?	YES _____ NO _____
<p>HIGH-COST MORTGAGE QUESTIONS</p> <p>OWNER OCCUPIED CONSUMER LOANS ON 1-4 RESIDENTIAL ONLY</p>	<p>DOES 15USC, SECTION 1601 ET SEQ., 12 CFR SECTION 226.32 APPLY (SECTION 32)? YES _____ NO _____</p> <p>DOES CALIFORNIA FINANCIAL CODE SECTION 4970 ET SEQ APPLY (CAL 32)? YES _____ NO _____</p> <p>DOES 15USC, SECTION 1601 ET SEQ., 12 CFR SECTION 226.35 APPLY (SECTION 35)? YES _____ NO _____</p> <p>DOES CALIFORNIA FINANCIAL CODE 4970 ET SEQ APPLY (CAL 35)? YES _____ NO _____</p>
IS THIS LOAN BASED ON LIMITED OR NO DOCUMENTATION OF THE BORROWERS' INCOME AND/OR ASSETS?	YES _____ NO _____
LANGUAGE LOAN WAS NEGOTIATED IN	<p>LANGUAGE: _____</p> <p>PLEASE NOTE: YOUR MLDS MUST BE PROVIDED IN THE NEGOTIATED LANGUAGE FOR BOTH THE INITIAL AND FINAL DISCLOSURES.</p>
<p>LENDER #1 INFORMATION</p> <p>A TRUSTEE MUST BE NAMED ON ALL TRUSTS, PROFIT SHARING PLANS, 401K PLANS, ETC.</p>	<p>AMOUNT OF LOAN OWNED: \$ _____</p> <p>NAME AND VESTING OF LENDER:</p>

LENDER #2 INFORMATION <i>A TRUSTEE MUST BE NAMED ON ALL TRUSTS, PROFIT SHARING PLANS, 401K PLANS, ETC.</i>	AMOUNT OF LOAN OWNED: \$ _____ NAME AND VESTING OF LENDER:
LENDER #3 INFORMATION <i>A TRUSTEE MUST BE NAMED ON ALL TRUSTS, PROFIT SHARING PLANS, 401K PLANS, ETC.</i>	AMOUNT OF LOAN OWNED: \$ _____ NAME AND VESTING OF LENDER:
LENDER #4 INFORMATION <i>A TRUSTEE MUST BE NAMED ON ALL TRUSTS, PROFIT SHARING PLANS, 401K PLANS, ETC.</i>	AMOUNT OF LOAN OWNED: \$ _____ NAME AND VESTING OF LENDER:
LENDER #5 INFORMATION <i>A TRUSTEE MUST BE NAMED ON ALL TRUSTS, PROFIT SHARING PLANS, 401K PLANS, ETC.</i>	AMOUNT OF LOAN OWNED: \$ _____ NAME AND VESTING OF LENDER:
HELOC INFORMATION	HIGH CREDIT AVAILABLE (MAY BE HIGHER THAN LOAN AMOUNT): \$ _____ INITIAL DRAW (SHOULD BE LESS THAN THE LOAN AMOUNT/HIGH CREDIT): \$ _____ DRAW FEE: \$ _____ OR _____% MINIMUM DRAW AMOUNT: \$ _____ MAXIMUM DRAWS PER MONTH: _____ DRAW TERM (LESS THAN LOAN TERM): _____ EARLY CLOSURE FEE IN THE AMOUNT OF \$ _____ DUE IF LOC CLOSED BEFORE _____ MONTHS
CONSTRUCTION DOCUMENT INFORMATION (COMPLETE IF ORDERING	IS YOUR CONSTRUCTION DRAWS BASED ON: VOUCHER SYSTEM _____ OR DRAW SCHEDULE _____

CONSTRUCTION DOCUMENTS)	NAME OF ARCHITECT: _____ CONTRACT DATE WITH ARCHITECT: _____ NAME OF BUILDER/CONTRACTOR: _____ CONTRACT DATE WITH BUILDER/CONTRACTOR: _____ NAME OF ENGINEER: _____ CONTRACT DATE WITH ENGINEER: _____ NAME OF GEOTECH REPORT COMPANY: _____ DATE OF GEOTECH REPORT: _____ ESTIMATED DATE OF COMMENCEMENT OF CONSTRUCTION: _____ AMOUNT OF CONSTRUCTION FUNDS TO BE HELD \$ _____ INSPECTION FEES \$ _____ TO WHOM TO BE PAID _____ NAME OF COMPANY HOLDING CONSTRUCTION FUNDS: _____ HAS ANY WORK COMMENCED ON THE PROPERTY TO DATE? _____ IF SO, WHEN? _____
ARBITRATION AGREEMENT TO BE INCLUDED	YES _____ NO _____ **NOTE: YOU CANNOT HAVE BOTH AN ARBITRATION AGREEMENT AND JUDICIAL REFERENCE – YOU MUST CHOOSE ONE OR THE OTHER, OR NEITHER.
JUDICIAL REFERENCE TO BE INCLUDED	YES _____ NO _____ **NOTE: YOU CANNOT HAVE BOTH AN ARBITRATION AGREEMENT AND JUDICIAL REFERENCE – YOU MUST CHOOSE ONE OR THE OTHER, OR NEITHER.
SPECIAL LOAN INSTRUCTIONS (I.E. SUBORDINATING LOAN INSTRUCTIONS, LIENS ALREADY PAID OFF SHOWN ON PRELIM, NEW DEED OF TRUST RECORDING CONCURRENTLY ETC.)	
TO WHOM IS THE LOSS PAYEE FOR THE FIRE INSURANCE TO BE DIRECTED	SERVICING AGENT INFORMATION TO BE USED IF THIS IS LEFT BLANK
TO WHOM IS THE DEED OF TRUST TO BE RETURNED	SERVICING AGENT INFORMATION TO BE USED IF THIS IS LEFT BLANK

DEDUCTIONS FROM LOAN PROCEEDS

PLEASE NOTE IF PAID OUTSIDE OF ESCROW BY INDICATING "()" AROUND THE AMOUNT. ALL FIGURES MUST BE INCLUDED AND SHOULD BE EXACT. DO NO ESTIMATE ON ANY AMOUNTS EXCEPT PAYOFFS OR REINSTATEMENTS. IF A RESPA LOAN, THESE FIGURES SHOULD MATCH YOUR MLDS/GOOD FAITH ESTIMATE. THE ACTUAL TITLE/ESCROW FEES SHOULD HAVE BEEN OBTAINED PRIOR TO COMPLETING YOUR INITIAL DISCLOSURE. PLEASE BE SURE ALL TITLE/ESCROW/ESCROW FEES HAVE BEEN DISCLOSED PROPERLY ON INITIAL DOCUMENTS AND ARE WITHIN TOLERANCE. PLEASE REVIEW YOUR MLDS/GOOD FAITH ESTIMATE TO BE SURE ALL FEES ARE IN TOLERANCE.

YOU CAN ATTACH THE ESTMATED CLOSING STATEMENT IN LIEU OF WRITING ALL FIGURES.

FOR WHAT SERVICE	PAYABLE TO BROKER	PAYABLE TO OTHER PARTY	IF TO OTHER, TO WHOM
APPRAISAL	\$	\$	
ESCROW FEE	\$	\$	
TITLE INS. LENDER POLICY	\$	\$	
TITLE INS. OWNER POLICY	\$	\$	
NOTARY FEE	\$	\$	
SIGNING FEE	\$	\$	
RECORDING FEES	\$	\$	
TITLE CO. DOC PREP FEE	\$	\$	
BROKER DOC PREP FEE	\$	\$	
PLM DOC PREP FEE	\$	\$	
UNDERWRITING FEE	\$	\$	
LOAN PROCESSING FEE	\$	\$	
COURIER FEE	\$	\$	
WIRE FEE	\$	\$	
REFERRING BROKER'S FEE	\$	\$	
LENDER DISCOUNT FEE	\$	\$	
ADMINISTRATIVE FEE	\$	\$	
INITIAL IMPOUND DEPOSIT	\$	\$	
PREPAID PAYMENTS	\$	\$	
YOUR BROKER'S COMMISSION/FEE	\$	\$	
FIRE/HAZARD INSURANCE PREMIUM	\$	\$	
RECONVEYANCE FEE	\$	\$	
PAYOFF ON EXISTING 1 ST D/T	\$	\$	
PAYOFF ON EXISTING 2 ND D/T	\$	\$	
PAYDOWN OF EXISTING D/T	\$	\$	
PAYMENT OF COUNTY TAX	\$	\$	
OTHER _____	\$	\$	
OTHER _____	\$	\$	

DOCUMENT FEES/INFORMATION/TERMS – PLEASE MARK SERVICE REQUESTED

- () RESIDENTIAL BORROWER DOCUMENTS ONLY: \$450
RESIDENTIAL FULL SET OF BORROWER & LENDER DOCUMENTS: \$600
- () CONSTRUCTION DOCUMENTS – \$350
- () REDRAW CHARGE - \$250 (IF MORE THAN 5 LENDERS \$350)
- () RESIDENTIAL HELOC DOCUMENTS – BORROWER ONLY \$700
- () RESIDENTIAL HELOC DOCUMENTS –BORROWER AND LENDER DOCUMENTS \$850

- () COMMERCIAL DOCUMENTS – FULL SET OF BORROWER & LENDER DOCUMENTS \$700
- () COMMERCIAL DOCUMENTS - BORROWER DOCUMENTS ONLY: \$550
- () COMMERCIAL HELOC DOCUMENTS – FULL SET OF BORROWER & LENDER DOCUMENTS \$950

SUBJECT TO THE ADDITIONAL CHARGES:

- ❖ IF IMPOUND DOCUMENTATION IS NEEDED: \$200
- ❖ MORE THAN ONE PROPERTY - \$75 FOR EACH ADDITIONAL PARCEL (ABOVE ONE)
- ❖ IF MULTI-LENDER AND MULTI-PROPERTIES WHEREBY AN 851D FORM MUST BE PREPARED: \$250
- ❖ IF REQUESTING MORE THAN 5 SETS OF LENDER DOCUMENTS: \$50 PER ADDITIONAL LENDER
- ❖ EXTRA WORK CHARGE: > \$350 AT PLM'S DISCRETION - FOR PRICE QUOTE, PLEASE CONTACT AMBER@PLMWEB.COM AND/OR LIZ@PLMWEB.COM

DELIVERY PROCESS

- E-MAIL BORROWER DOCUMENTS – **MUST BE SENT TO BROKER** FOR REVIEW AND FORWARDED TO THE TITLE COMPANY: BROKER E-MAIL ADDRESS _____
- E-MAIL LENDER DOCUMENTS - **MUST BE SENT TO BROKER** FOR REVIEW AND FORWARD TO THE LENDER: BROKER E-MAIL ADDRESS _____
- E-MAIL BORROWER DOCUMENTS TO TITLE: _____

BROKER UNDERSTANDS THAT IT IS A REQUIREMENT TO SEND DOCUMENTS TO BROKER FOR REVIEW, HOWEVER, BROKER IS REQUESTING PLM TO SEND DOCUMENTS DIRECTLY TO TITLE COMPANY IN ADDITION TO BROKER DUE TO TIME RESTRAINTS. BROKER/AGENT CERTIFIES HE/SHE IS RESPONSIBLE FOR CONTACTING TITLE AFTER DOCUMENT REVIEW TO AUTHORIZE SIGNING OF DOCUMENTS.

PLEASE SELECT THE SERVICES YOU ARE ORDERING. ALL FEES ARE DUE AT TIME SERVICE IS RENDERED, HOWEVER, AS A COURTESY PLM MAY SUBMIT THE BILL TO ESCROW FOR PAYMENT.

SHOULD PLM ALLOW FEES TO BE PAID AT A LATER DATE, PAYMENT SHALL BE MADE WITHIN TEN DAYS OF BILLING. PLM FEE IS DUE AND PAYABLE FOR SERVICES RENDERED REGARDLESS OF WHETHER THE TRANSACTION IS CONSUMMATED OR NOT. PLM RESERVES THE RIGHT TO REFUSE SERVICE ON ANY ORDER THAT DOES NOT MEET THE APPLICABLE REQUIREMENTS OF THE REAL ESTATE LAW OR THE FINANCE LENDER LAW.

MASTER AGREEMENT WITH PLM MUST BE ON FILE BEFORE PLM CAN PREPARE ANY DOCUMENTS. SIGNOR ON THESE DOCUMENTS MUST BE NAMED ON THE MASTER AGREEMENT WITH PLM. IF MASTER AGREEMENT IS NOT ON FILE, PLEASE SUBMIT IT WITH THIS ORDER TOGETHER WITH A COPY OF A VALID BROKER/AGENT'S LICENSE AND ENDORSEMENT TO SAID LICENSE. MASTER AGREEMENT MUST HAVE WET SIGNATURE PROVIDED BUT THIS DOC ORDER MAY BE SIGNED ELECTRONICALLY OR TYPED IN.

BROKER OR AUTHORIZED AGENT'S SIGNATURE

DATE

PRINT NAME AND TITLE

CELL PHONE #: _____

OFFICE # _____

FOR PRICE QUOTES/QUESTIONS REGARDING AN UPCOMING ORDER SUBMISSION, PLEASE CONTACT AMBER@PLMWEB.COM *PRIOR TO* SUBMITTING YOUR COMPLETED REQUEST.

**ALSO AVAILABLE TO ASSIST WITH YOUR DOC DEPARTMENT INQUIRIES:
LIZ@PLMWEB.COM AND/OR CHENOA@PLMWEB.COM**