

## REQUIRED items needed when requesting the preliminary CD:

- Initial Disclosures Signed
- Conditional Approval
- Loan Locked

Once you have confirmed the above, you will then need to make sure that the items below are in the MFSTPO:

- Title Commitment
- Tax Cert
- Prelim CD from title
- ICL
- Wiring Instructions
- HOI (No quotes)
- All Invoices

Once ALL the above requirements have been met, the next step is to request the preliminary CD through MFSTPO by completing the following steps:

- Go to MFSTPO and select the loan you wish to request the initial CD on
- Once you are in the loan, on the left side click on the "URLA 2020 and it will expand
- Request CD is at the bottom, click this
- It will then open and ask you to input the close date and any special notes that may be needed
- After you have completed you will click save on the bottom right and confirm
- Your loan will then go into the queue of Jessica White, and she will work on preparing the CD for your review. Make note that she will not send out the CD until she has approval from you. If you need to reach out to her prior to the CD being prepared, please email her at [jwhite@mfsus.com](mailto:jwhite@mfsus.com)