



**REFINANCE / LOAN / HELOC OPEN ORDER SHEET**

Date: \_\_\_\_\_ Loan Type: \_\_\_\_\_ Escrow Officer: **Marlen Videz**

**LOAN DETAILS**

Loan Originator: \_\_\_\_\_ Loan Officer: \_\_\_\_\_  
Office Address: \_\_\_\_\_  
Loan Officer's Phone: \_\_\_\_\_ Loan Officer's Fax: \_\_\_\_\_  
Processor: \_\_\_\_\_ Processor's Phone: \_\_\_\_\_  
Processor's Fax: \_\_\_\_\_ Processor's Email: \_\_\_\_\_

Property Address: \_\_\_\_\_ City: \_\_\_\_\_  
State: \_\_\_\_\_ County: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
LOAN AMOUNT (1<sup>ST</sup>): \_\_\_\_\_ LOAN AMOUNT (2<sup>ND</sup>): \_\_\_\_\_

**BORROWER**

Borrower's Name: \_\_\_\_\_ SS#: \_\_\_\_\_  
Co-borrower's Name: \_\_\_\_\_ SS#: \_\_\_\_\_  
Borrower's #: \_\_\_\_\_ Work #: \_\_\_\_\_ Email: \_\_\_\_\_  
Co-borrower's #: \_\_\_\_\_ Co-Work #: \_\_\_\_\_ Email: \_\_\_\_\_  
Alternative #: \_\_\_\_\_

**TITLE**

**ORDER TITLE?** YES  NO  Title Order #: \_\_\_\_\_  
Title Company: \_\_\_\_\_ Title Officer: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_  
Sales Rep. Credit to: \_\_\_\_\_ Sales Rep. Phone: \_\_\_\_\_

**PAY OFF**

**PAY OFF INFORMATION:**  
1<sup>ST</sup> Trust Deed: \_\_\_\_\_ Approx. Balance: \_\_\_\_\_  
Loan #: \_\_\_\_\_ Phone #: \_\_\_\_\_  
2<sup>ND</sup> Trust Deed: \_\_\_\_\_ Approx. Balance: \_\_\_\_\_  
Loan #: \_\_\_\_\_ Phone #: \_\_\_\_\_

**INSURANCE**

Insurance Co.: \_\_\_\_\_ Agent: \_\_\_\_\_ Email: \_\_\_\_\_  
Policy #: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_