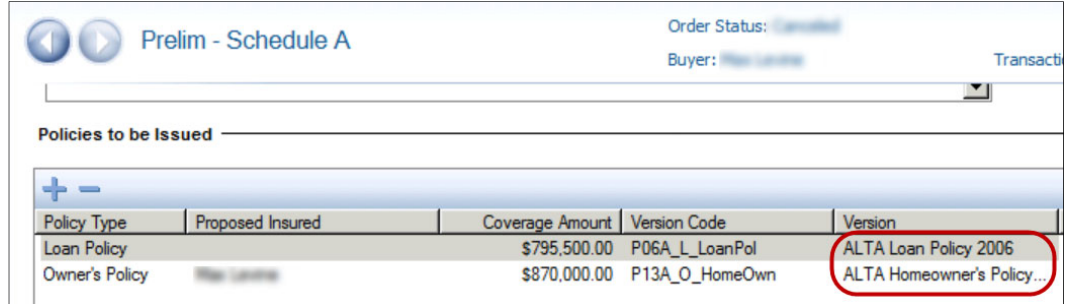


Follow these steps to prepare a Proforma policy for any policy. In our example, we are issuing a Proforma Owner's Policy.

1. Navigate to the **Commitment/Prelim – Schedule A** screen
2. Under **Policies to be Issued**, verify the appropriate policies have been selected

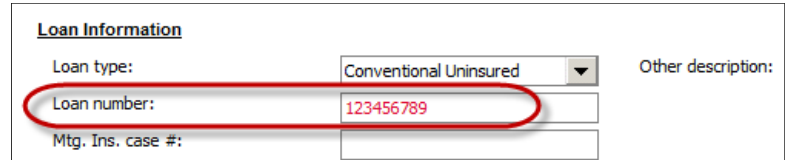


Order Status: **Cancelled**
Buyer: **NEW LOAN**

Policies to be Issued

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy		\$795,500.00	P06A_L_LoanPol	ALTA Loan Policy 2006
Owner's Policy	NEW LOAN	\$870,000.00	P13A_O_HomeOwn	ALTA Homeowner's Policy...

3. If necessary, disclose the loan number
 - a) Navigate to the **Loan Information & Funding** screen
 - b) Enter the **Loan number**



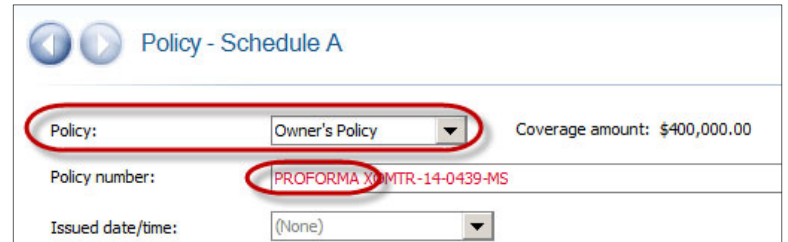
Loan Information

Loan type: **Conventional Uninsured** Other description:

Loan number: **123456789**

Mtg. Ins. case #:

4. Navigate to **Policy – Schedule A** screen
5. In the **Policy** drop-down, select the appropriate policy
6. In the **Policy number** field, enter the word **PROFORMA** in front of the policy number
7. If necessary, enter any additional Schedule A information
8. Navigate to **Policy – Schedules B1, B2** screen
9. In the **Policy** drop-down, select the appropriate policy
10. Click the **Start Policy** icon, select **Overwrite**; click **OK**

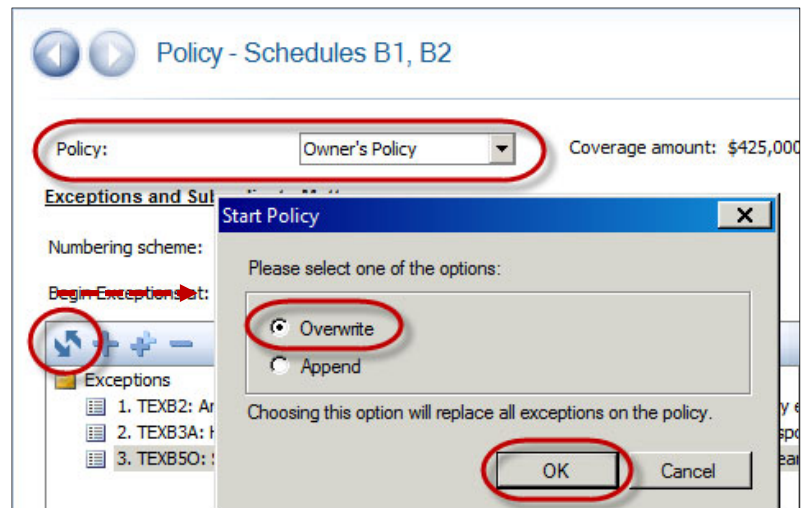


Policy - Schedule A

Policy: **Owner's Policy** Coverage amount: \$400,000.00

Policy number: **PROFORMA X MTR-14-0439-MS**

Issued date/time: **(None)**



Policy - Schedules B1, B2

Policy: **Owner's Policy** Coverage amount: \$425,000.00

Exceptions and Schedules

Numbering scheme:

Begin Exceptions at:

Start Policy dialog:

Please select one of the options:

☒ **Overwrite**

☐ Append

Choosing this option will replace all exceptions on the policy.

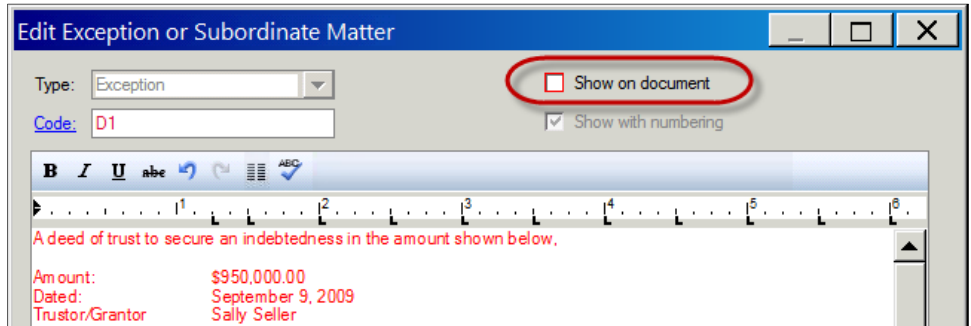
OK **Cancel**

11. Mark each exception you **Do Not** want to show on the Proforma policy
 - a) Double-click the exception

- b) Either renumber **OR** mark the exception intentionally deleted
- c) Repeat for each exception you want to exclude

Renumber

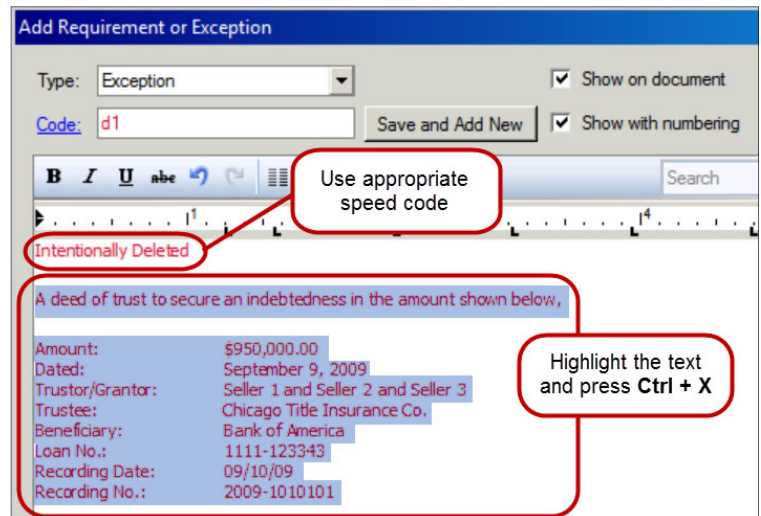
- i. Uncheck the **Show on document** check box
- ii. Click the **OK** button



Maintain Numbering (keep same numbering as Commitment/Prelim)

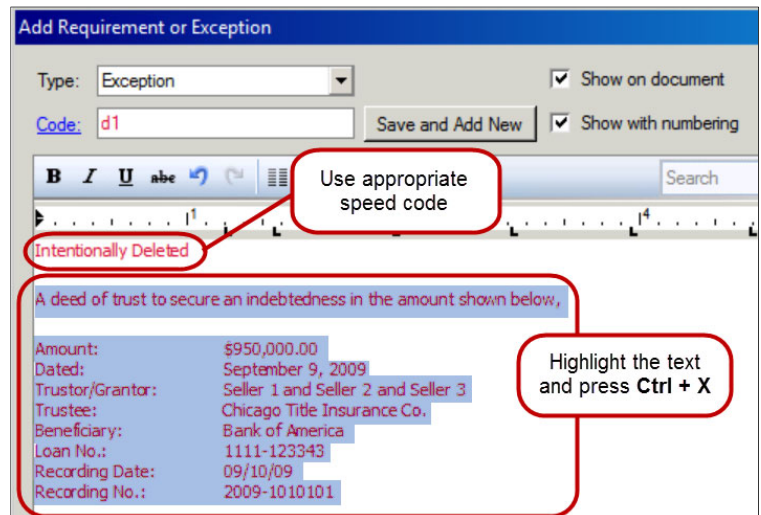
- i. Insert your Operation's speed code to bring in the *Intentionally Deleted* or *Omitted* text
 - > xid or xiid = INTENTIONALLY DELETED
 - > xio = INTENTIONALLY OMITTED

NOTE: Refer to the *Speed Codes* job aid for your operation if you are unsure which to use.

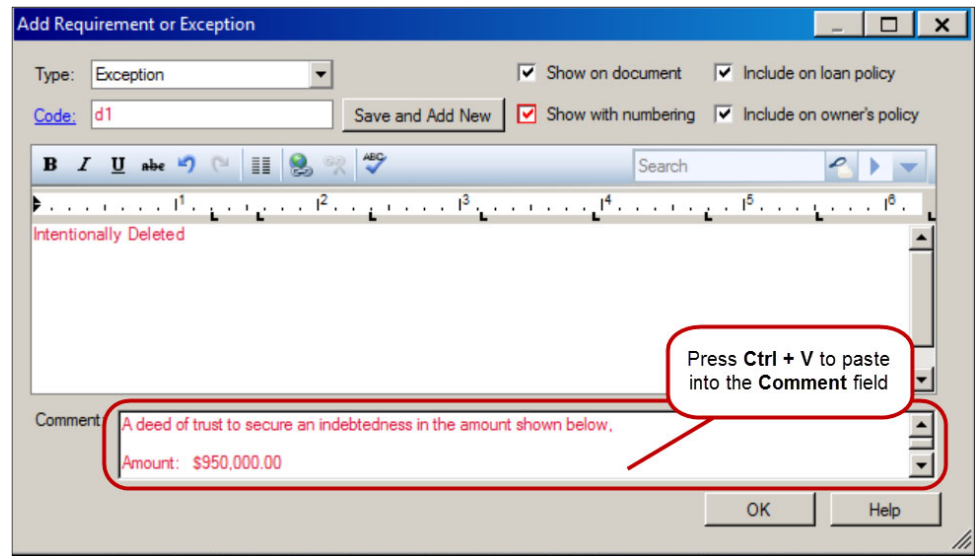


If necessary, you can hide the exception text,

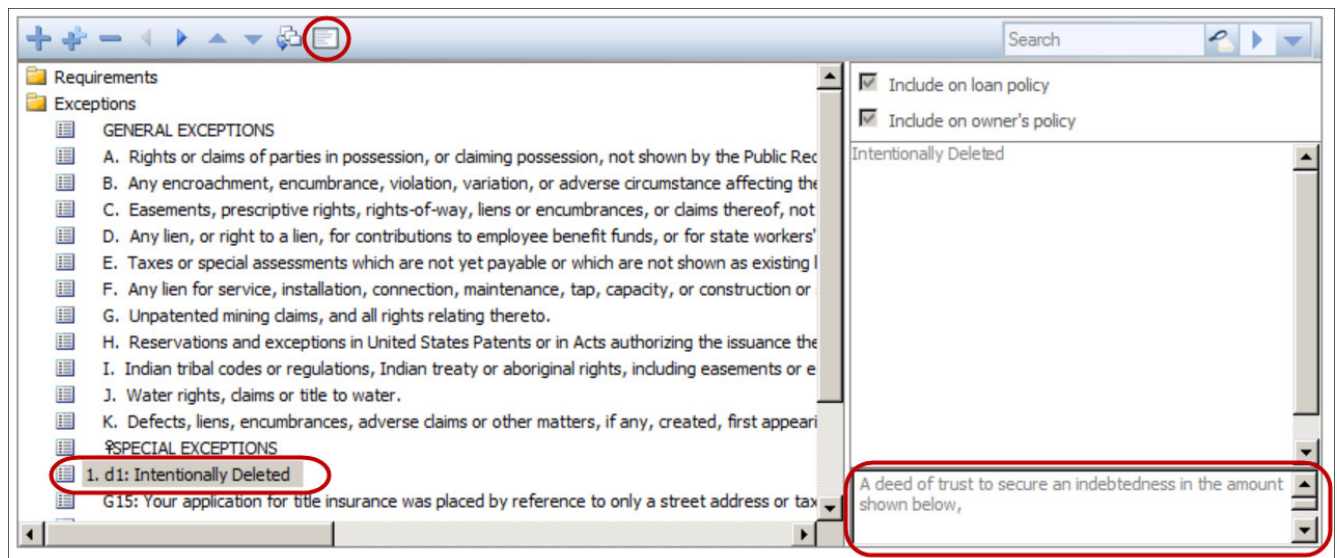
- ii. Highlight the text
- iii. Press the **Ctrl + X** keyboard shortcut; this cuts and copies the text to the clipboard



- iv. Place your cursor in the **Comment** field, press the **Ctrl + V** keyboard short; the omitted text is pasted in the **Comment** field



Text in the **Comment** field is not shown on documents but can be seen when using the **Preview** feature when viewing exceptions/requirements without having to open the entry.



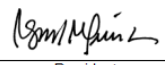
12. If necessary, add any new exceptions
13. If necessary, add any endorsements


Results on the Policy – Schedule A

By adding the word 'Proforma' to the **Policy number** field,


- › The existing countersignature is replaced with 'Proforma'
- › Proforma disclaimer language is added to the footer of each page

Chicago Title Company
2150 John Glenn Drive, Suite 400
Concord, CA 94520

By: 
President

Attest: 
Secretary

Countersigned By:
PROFORMA
Authorized Officer or Agent



This is a PROFORMA Policy. It does not reflect the present state of the Title and is not a commitment to (i) insure the Title or (ii) issue any of the attached endorsements. Any such commitment must be an express written undertaking on appropriate forms of the Company.

Copyright American Land Title Association. All rights reserved.
The use of this Form is restricted to ALTA licensees and ALTA members in good standing as of the date of use. All other uses are prohibited. Reprinted under license from the American Land Title Association.

ALTA Owner's Policy (06/17/2005) Page 2 CA-CT-FWTO-02180.052407-SPS-27308-1-14-XCOMM-14000231 Printed: 10.01.14 @ 03:29PM

- › The policy number shows 'Proforma'
- › The existing **Date of Policy, Amount of Insurance, and Premium** are replaced with 'Proforma'

NOTE: Showing the **Amount of Insurance** appears as a document prompt.

FIDELITY NATIONAL TITLE INSURANCE COMPANY

POLICY NO. PROFORMA XCOMM-14000231

SCHEDULE A

Name and Address of Title Insurance Company: Kathleen Trites
Chicago Title Company
2150 John Glenn Drive, Suite 400
Concord, CA 94520

Address Reference: 13717 My Sunny Street #1, Half Moon Bay, CA 94019
13719 My Sunny Street #2, Half Moon Bay, CA 94019
13721 My Sunny Street #3, Half Moon Bay, CA 94019

Date of Policy	Amount of Insurance	Premium
PROFORMA	PROFORMA	PROFORMA

1. Name of Insured:

Schedule B

SCHEDULE B
EXCEPTIONS FROM COVERAGE
(continued)

4. Intentionally deleted

5. A deed of trust to secure an indebtedness in the amount shown below,

Amount: \$950,000.00 or other amount
Dated: TBD
Trustor/Grantor: To be determined
Trustee: to be determined
Beneficiary: First Ever Bank

Endorsement

Charge: PROFORMA

This endorsement is issued as part of the policy. Except as it expressly states, it does not (i) modify any of the terms and provisions of the policy, (ii) modify any prior endorsements, (iii) extend the Date of Policy, or (iv) increase the Amount of Insurance. To the extent a provision of the policy or a previous endorsement is inconsistent with an express provision of this endorsement, this endorsement controls. Otherwise, this endorsement is subject to all of the terms and provisions of the policy and of any prior endorsements.

Fidelity National Title Insurance Company

Dated: PROFORMA

Countersigned By:
PROFORMA
Authorized Officer or Agent

Attached to Number:

PROFORMA
XCOMM-14000231