SOFTPRO SELECT

RELEASE NOTES

FEBRUARY, 2019

Testing Release Date: February 7, 2019

Production Release Date: February 22, 2019

FEBRUARY
RELEASE NOTES

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ALL STATES/SITES

DOCUMENTS

Escrow

1099-S Substitute Form

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	PacNW		515237	

Revised functionality so document will not render for "corporation" type sellers.

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Authority Checklist

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Kansas City		520556	

Added the entity name under the File No.

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Corporate Invoice
Consolidated Invoice

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
MOD	CORP		520726,516258	

- Three new custom fields were added for use on HTML invoice, with the following logic:
  - Custom field label: "Do Not Show Property Address"
    - Type: checkbox
    - Code: {{Order.InvoiceDoNotShowPropertyAddress_FNF#}}
    - Logic: if box is checked suppress the property address in the property description section
  - Custom field label: "Do Not Show Property Description Section"
    - Type: checkbox
    - Code: {{Order.InvoiceDoNotShowPropertyDescription_FNF#}}
    - Logic: if box is checked suppressed the property description section as a whole
    - Note: there is a custom field to suppress the escrow brief legal that shows up in the property description section. If this box is checked, but the do not show escrow brief and/or do not show property address are not checked, this box "wins" and will suppress the whole section. Also, note that if this box is not checked, but the do not show escrow brief legal AND do not show property address are we would force check this box and suppress this whole section.
  - Custom field label: "Do Not Show Policies Applied for Section"
    - Type: checkbox
    - Code: {{Order.InvoiceDoNotShowPoliciesAppliedFor_FNF#}}
    - Logic: if box is checked suppress the policies applied for section description section as a whole
    - Note: we are only suppress the policies applied for section. No change to the naming scheme for the premium charge in the line description.
- Added property number to each property shown, IE Property Description (1): 11 Main st.
  - show this for each property shown on the invoice
- Updated logic for when to prompt for properties to show. new property drop down listed on invoice screen. if this is blank invoice (or does not exist on the order for older orders) invoice will prompt for which properties to show, but if it has a value that is the property the invoice will show with no prompt.
- Updated invoice for custom field Show Tax ID {{Order.InvoiceShowTaxID_FNF#}}, when tax id is shown adjusted the label to be Tax ID: 12-123456
- Retained current format for LCT Bay to show as "FEIN: 12-123646

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Open Order Sheet (Order Summary)
Open Order Sheet (Order Summary) - Ltr
Open Order Sheet (Order Summary) with Notes
Open Order Sheet (Order Summary) with Notes - Ltr

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Seattle NCS		521734	

FT Seattle NCS ONLY: Updated to show "Additional Description:" label and field if filled in.

Marketing Rep(s):

Transaction Type	Order Type	Product Type	Policy Type
Other	Title only	Sale/Re-Sale	Simultaneous

Additional Description:	[add'l desc. here]	Product Due:	November 2, 2018
Order Opened Date:	March 14, 2017	Closing Date:	November 30, 2018
Order Opened By:	Default Admin Account	Disbursement Date:	November 30, 2018
Sales Price:	$ 301,000.00	Loan Amount(s):	$ 250,000.00

Policy Code: ILCT-Blank Simo

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Payoff Authorization (esign)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	Settlement		516824	SSCORPD5654.doc

New document. Render to view complete document.

BORROWER'S AUTHORIZATION

Company Name

Borrower: Bob L. Buyer and Betty A. Buyer

Property: 1001 Property Address, City, IN 49503

The undersigned borrower authorizes Chicago Name to order payoff statements on behalf of the borrower to facilitate the proper closing of the borrower's current real estate transaction.

Chicago Name is authorized to make payment from funds accruing to my account at the close of escrow, including but not limited to forwarding fees, service fees, transfer fees, payments, reconveyance fees, interest or prepayment charges as charged without my further approval.

For Line of Credit loans, upon receipt of a request to provide a payoff statement, authorization is hereby given and demand made to freeze the account. Further, upon receipt of payoff funds, the lender is also authorized and instructed to immediately close and cancel the account and to release any and all security for said Line of Credit loan.

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Preliminary Report Approval - Buyer
Preliminary Report Approval - Buyer - DS

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	Settlement		518324	

Added CAR 2018 Residential Income to the dropdown list and associated that selection with paragraph 18A on the report.

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Wire Fraud Checklist (Prompt)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	FT MI		514832	SSCORPD5650.doc

New document. Render to view complete document.

Has there been a change to wire instructions?	☑ Yes	☐ No
Are you being asked to change a check to a wire?	☑ Yes	☐ No
Is there a letter of direction for proceeds?	☑ Yes	☐ No
Is wire International?	☑ Yes	☐ No

If YES, STOP NOTIFY MANAGER IMMEDIATELY!

SIGNATURE MANAGER APPROVAL

If the answer to the above is NO, or have manager's approval, verify the following for ALL WIRES:

Wire Instructions were verified (Select One):

☐ **Wire Instructions were filled out at closing table and info was not received via fax or email.**

☑ **Verbally with:** verbally filled with answer goes here

- Via Verified No.: 09800

- Source of Verified No.: 888999

☑ **Lender List** (for payoffs)

☑ **Prior File No.:** (for payoffs) 98707

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Title

Special Endorsement 55

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT DC NCS		520634	

Revised so that if Requirements, Exceptions or Subordinate Matters have been added on this Endorsement's screen, they will pull to the Endorsement.

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REPORTS

1099-S Exceptions
1099-Misc

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	TX		507622	

- 1099-S :Added new checkbox called "Include Duplicate TIN/SSN:" and placed under 'Include record with 0.00 proceeds' and defaulted to checked.
  - checkbox will be used to determine if the duplicate TIN/SSN exception should or should not show.
- 1099-MISC: Added new checkbox called "Include Duplicate TIN/SSN:" and placed under 'Include exempt entries' and defaulted to checked.
  - checkbox will be used to determine if the duplicate TIN/SSN exception should or should not show.

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Construction Disbursements Exceptions

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		514296	

- Updated exception - "Self Approved Draw"
  - Report will return the exception once per draw that is self apporoved for each order if applicable
  - Updated excpetion name to show as "Draw #: 1, Self-Approved Draw"
  - Updated programming notes
- Updated Missing Contract Amount and Draw Amounts Exceed Contract Amount excpetions to return a distinct count for each order.

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IBA Detail by Bank and Escrow

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	BOS NCS		515862	

- Report is currently set to NOT return orders with a zero dollar balance. If the last transaction (last activity date) is equal to the 'As of date' then report will include IBA's with a zero balance.

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In Process/Pipeline Orders

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		516374	

- Update parameter: "Liability amounts ('commercial format only'):" to default to Highest Liability

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Invoice Aging

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CT IL		512899	

- Updated logic for "Include zero balance invoices" to show the 1st invoice even if the order has a posted ledger.

- Currently, invoice 1 is fully suppressed from the report if a ledger is posted to a revenue contact.

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Invoice Exceptions

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		515962	

- Added a new exception to invoice exceptions called "Missing Bill Code" that will flag orders that have an invoice in sent status and an invoice line is missing a bill code.
    - (Note: the bill code should be enforced from a profile setting that would show an error if they tried to send an invoice with no bill code. In the past the profile has not always been updated. CRRAR team has asked for this exception to find these faster.)

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Marketing Source Activity

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CT OK		508459	

- Marketing source contact type drop down on the parameter screen – added a new option called "Listing and Selling Agent/Broker" and if selected report will limit to listing and selling agent contacts.

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Multi- Property Report

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		413697	

(4.3.5)

- Updated for new commercial settlement type (CSS)
    - for CSS orders:
        - Report will now use the properties to include on the loan screen to determine which loans each property is tied to. This will help determine how much liability to show for each property.

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Orders by Selection

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	GA NCS		516388	

- For the Group 1 drop down added a new option for "Property State"

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Open/Closed Orders by Selection

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CA		513081	

- Added new option to group drop down: "TAC Code" and will group the orders by the Trust Account Code
- Premium Rev Only changes:

  - Updated parameter name to show as "Premium Rev only (commercial format only):"
  - When this box is checked the only revenue columns that will show is the Title Revenue and Total when commercial format is selected
- Added new picklist parameter for Property State and placed at the bottom of parameter screen after the last current picklist. When option(s) are selected report will only return orders that have a property with that state.

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Order Count/Revenue Summary

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		505976	

- Removed Show LCP count/Revenue group 1 parameter
- Added new checkbox called "Use Property Count:" and placed between exclude indirect orders checkbox and commercial/residential filter drop down, and defaulted to unchecked.
  - If checked return the property count of the orders shown and return this as the opened/closed counts
- Exclude indirect orders prompt - Updated logic in prompt, so that if checked report will exclude indirect orders and if unchecked show as separate row like the LCP counts did, but label as indirect
- Re-named LCP/FLAG rows on report to show as “Indirect”
- Added new option to group 2 by drop down on parameter screen: 'Additional Description', this will group by the Additional Description custom field {{Order.AdditionalDescription_FNF#}}
- For NCS Profiles/Offices
  - Report will include CRRAR Rev field in title revenue column {{Order.CRRARRev_FNF#}}
  - Replaced In/Out of County Daily Count Breakdown for Report Totals and MTD Count Breakdown for Report Totals summary with Property Use (pull from property 1, unless use property count checkbox is checked, then show for all properties)
  - Replaced Commercial/Residential Daily Count Breakdown for Report Totals and MTD Count Breakdown for Report Totals summary with Property State (pull from property 1, unless use property count checkbox is checked, then show for all properties)

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ProClear Results

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		516763	

- Updated report to only pull trust accounts that have been reconciled as of 1/1/2018 and forward if date is left blank

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SPAdmin Custom Source of Business

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		516879	

- Added 5 new columns between Escrow # and Borrower as follows:
  - Listing Agent/Broker - pulls the contact (company) name of the first listing agent
    - {{Order.ListingAgentBrokers[1].Name}}
  - Seller Type - shows as 'Individual' if all sellers are listed as Individual. If one or more sellers is listed as an organization then show as 'Organization'
  - Seller - pulls in the name(s) of all sellers, concatenanted in the same cell (same behavior as the current borrower column)
  - Selling Agent/Broker - pulls the contact (company) name of the first selling agent {{Order.SellingAgentBrokers[1].Name}}
  - Buyer Type - shows as 'Individual' if all buyers are listed as Individual. If one or more buyers is listed as an organization then show as 'Organization'

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Receipts and Disbursements (Pending and Held)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	OH		514922	

- Changed current group by option check box "Group by Branch" into a drop down list with the following options:
  - None (default) - will work the same as the current logic of the checkbox bein unchecked
  - Branch
  - Escrow Officer/Closer

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SPAdmin Order Number Manager Export

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
NEW	CORP		516363	SSCORP5387.rpt

General:
Title – SPAdmin Order Numbering Manager Export
Tree location – SPAdmin tree, manager's folder

Parameters:
- Include Disabled Managers Checkbox, default to unchecked
  - if unchecked only return active managers only
  - if checked include active and inactive
  - Show report programming notes

Groups:
- None

Columns:
- Status = Active or Disabled
- Name = name of order numbering manager
- Description = descriptions of order numbering managers
- Numbering Format
- Next Order Number = next sequence number
- Prefix required = Yes or No
- Prefixes = concatenate comma separated in one column
- Suffix required = Yes or No
- Suffixes = concatenate comma separated in one column
- Reset time = Reset type (None, Yearly, Monthly, etc.) – ResetBehavior column in DB
- Profile(s) Name Assigned = concatenate all profile names assigned to order number manager
- Last Updated Date = last date manager was updated
- Last Updated By = User name who last updated manager
- Database = name of SelectDb

Totals:
- None

Sorting:
- Alphabetically by manager name

Logic:
- pull all (active and/or active + disabled) Order Numbering Mangers
- format for excel only

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Template Log

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		503995	

- Changed the layout to show as landscape legal
- Changed name of column from Open Date to Created Date.
- After Created Date (FKA Open Date), added a new column called "Created with Version" and inserted the version of Select the template was created with
- Added a new column after template name called "Sett. Type" and will pull in the settlement type of the template
- Marketing Source Column - stacked the Company Name and Contact Name.
- Lender Column - stacked company name and address

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Title Production

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		510789	

- Updated "Service Level Percent Days" parameter to include 8. Currently report goes up to 7.

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Trending by State

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		515917	

- Added a new picklist parameter at the bottom of parameter screen for state picklist.
  - This will work the same as the group 1 logic for which orders it will pull when it is grouped by state.
- Group by drop down added 'Property Use' {{Order.Property.Use}}
  - if used property count checkbox is NOT checked, pull from property 1.
  - If used property count checkbox is checked, then pull from all properties in the order.
- Added "Months to show" drop down (like trending by selection)
  - options:
    - 1 Month
    - 3 Month
    - 6 Month
    - 12 Months (default)
- Updated "Liability Amounts" parameter to change the default to Highest Liability
- Added a new checkbox parameter called "Show Graph (group data):", placed this below liability amounts drop down, and defaulted to unchecked.
  - If checked add additional pages to report to show a circle graph based on the totals of each group that is selected in the group 1 drop down for orders opened, orders closed, Revenue, and Liability
  - For graph see YTD graph used on Order Mix Summary
- Changed the label of group 1 drop down to show as "Group By:
- Revenue Row - updated to include the CRRAR Rev field for orders closed in the date range {{Order.CRRARREVF_FNF#}}
- Added a new checkbox parameter called "Premium Revenue Only:", placed below Use Property Count checkbox, and defaulted to unchecked.
  - If checked, Revenue Row would only show TP, END, and CRRAR Rev amounts

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ARIZONA

DOCUMENTS

Escrow

Automated Disbursement Program Authorization - Payor
Automated Disbursement Program Authorization - Recipient

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Mohave		515134	

Updated documents to reflect new address.

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Lereta Tax Service Order Form

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	CT Mohave		515140	AZD1238.doc

New document. Render to view complete document.

LERETA
extraordinary service

TAX SERVICE ORDER FORM

Lender Number: 123456789 Branch: East Contact: Joe Black

Lender Name: Lender Bank & Trust Phone: (800)555-1111

Address: 1000 Big Money Avenue Order Date: March 14, 2017

City/State/Zip: Beverly Hills, CA 90210

Refinance: Yes ☐ No ☑ Previous LERETA Contract #____ Previous Loan #____

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LoanCare Account Servicing Agreement
LoanCare Flyer

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Mohave		515134	

Updated documents to reflect new address.

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LoanCare Roster

New/Mod	Requested By	Ticket No(s).	TFS No(s).	File Name (new items only)
New	CT Mohave		515140	AZD1237.doc

New document. Render to view complete document.

LoanCare Account Servicing-Seller Finance

www.accountservicing.myloancare.com https://fidelity.myloancare.com
accountservicing@myloancare.com
Escrow Payoffs Only: escrowhelp@loancare.net
Correspondence: 4330 W. Chandler Blvd., Chandler, AZ 85226
Prescott Office 1871 E. State Route 69, Prescott, AZ 86301
LoanCare 800-919-3009 FNF Service 800-509-0317 Fax 866-593-9158

Employee Roster

Name	Title-Job Description	Ext	Email Address
**Spanish Speakers*			
Jackie Paparelli	Division Manager	1058	Jacki.Paparelli@loancare.net
Lenora Ross	Client Liaison	9111	Lenora.Ross@loancare.net
Wendy Terena-Prescott-AZ	Investor Client Liaison	1064	Wendy.Terena@loancare.net
Grayson Pace-Show Low-AZ	ASR-ADOH	9120	Grayson.pace@loancare.net

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Memorandum (Agreement for Sale - Contract)

New/Mod	Requested By	Ticket No(s).	TFS No(s).	File Name (new items only)
New	CT Mohave		515140	AZD1234.doc

New document. Render to view complete document.

LOANCARE
ACCOUNT SERVICING

MEMORANDUM

Re: Documentation for New Account with **Agreement for Sale/Contract for Sale**

The following are the documents and fees needed to service an account with a Contract and deed:

1. Original Contract
2. Copy of Memorandum of contract with original to follow after recording (if there is one)
3. Unrecorded clearing deed
4. Account Setup Form.
   Needs to be completed, signed at the bottom of each page and signed by all parties to the account.

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Memorandum (Contract and Deed)

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	CT Mohave		515140	AZD1232.doc

New document. Render to view complete document.

LOANCARE
ACCOUNT SERVICING

MEMORANDUM

Re: Documentation for New Account with **Real Estate Contract and Clearing Deed**

The following are the documents and fees needed to service an account with a Contract and deed

1. Original Contract
2. Copy of Memorandum of contract with original to follow after recording (if there is one)
3. Unrecorded clearing deed

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Memorandum (Mobile Home Note)

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	CT Mohave		515140	AZD1233.doc

New document. Render to view complete document.

LOANCARE
ACCOUNT SERVICING

MEMORANDUM

Re: Documentation for New Account with **Manufactured Structure and Note.**

The following are the documents and fees needed to service an account with a Note and Manufactured Structure that has received payments prior to setup:

1. Original Note
2. Original or copy of Manufactured Structure
3. Lien Release document required by the state that the structure is in.
4. Account Setup Form.

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Memorandum (Note and PMM)

New/Mod	Requested By	Ticket No(s).	TFS No(s).	File Name (new items only)
New	CT Mohave		515140	AZD1236.doc

New document. Render to view complete document.

LOANCARE
ACCOUNT SERVICING

MEMORANDUM

Re: Documentation for New Account with **Note and Private Money Mortgage**

The following are the documents and fees needed to service an account with a Note and Deed of Trust:

1. Original Note
2. Copy of Mortgage with original to follow after recording
3. Direction for Full Release and Reconveyance
4. Account Servicing Agreement
   Needs to be completed and signed by all parties to the account.
5. Fee Schedule
   Needs to be initialed by all parties and returned with the setup package.
6. Settlement Statement
   If this is a transfer of an existing account, then please also include a complete payment history.
7. A W-9 from each party listed on the documents
8. The setup fee is $175.00 or $100.00 for Fidelity company escrow. Please make the check payable to LoanCare.

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Memorandum (Promissory Note)

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	CT Mohave		515140	AZD1235.doc

New document. Render to view complete document.

LOANCARE
ACCOUNT SERVICING

MEMORANDUM

Re: Documentation for a New Account with an **Unsecured Note/Promissory Note**

The following are the documents and fees needed to service an account with a Note

1. Original Note
2. Account Setup Form
   Needs to be completed, initialed at the bottom of each page and signed by all parties to the account.
3. Fee Schedule
   Needs to be initialed by all parties.
   The setup fee is $175.00 or $100.00 for Fidelity company escrow. Please make the check payable to LoanCare.
4. A W-9 from each party listed on the documents

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Methods to Make a Payment

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Mohave		515134	

Updated to reflect new address.

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FEBRUARY RELEASE NOTES

CALIFORNIA

DOCUMENTS

Escrow

593 Form (2019) - Tax Statement
593 Form (2019) - Tax Statement (Refi)

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Santa Barbara		522447	

Added new prompt for amount for item 5. Blank line will continue to render if the prompt is left empty.

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Affidavit (Owner's/Individual)
Affidavit (Owner's/Individual - Borrower)
Affidavit (Owner's/Organization)
Affidavit (Owner's/Organization - Borrower)
Affidavit (Owner's/Seller)

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel		515874	

Language in item 5 has been revised from "rights of renewal" to "rights of first refusal".

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Demand(s)

NEW/MOD	REQUESTED BY	TICKET NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT SoCal		518287	

Affected documents:

Demand - AITD
Demand - AITD w/ Authorization
Demand - Institutional
Demand - Institutional w/ Authorization
Demand - Lien for Spousal/Child Support
Demand - Lien for Spousal/Child Support w/ Authorization
Demand - Private w/ Authorization
Demand for Lien
Demand for Lien - Private Party
Demand for Release of Lien EDD
Demand for Release of Lien FTB
MH Jr. Lienholder Demand
MH Legal Owner Demand
MH Legal Owner Demand w/ Approval

Revised "We are scheduled to pay this loan on:" to "We are scheduled to pay off this loan, subject to the close of escrow, approximately on: <date>."

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LOOKUP TABLES

Escrow Instruction Phrases – SOCAL ONLY

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).
Mod	SoCal		517204

Revised to pull Lender's Name.

Code	Name
mh14	FINANCING

FINANCING: The buyers herein will execute a Security Agreement on your usual form or form handed to you, as part of the purchase price, to secure one note in the amount of One Hundred Sixty-Five Thousand And No/100 Dollars ($165,000.00), in favor of Bank of America with interest at Five Percent (5.000%) per annum from date of close of escrow, payable at place designated by holder, payable in installments of principal and interest in the amount of Eight Hundred Eighty-Five And 76/100 Dollars ($885.76), or more, per month, amortized over thirty (30) years, on the same day of each and every calendar month, beginning and continuing until paid in full.

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COMMERCIAL

DOCUMENTS

Escrow

General Provisions - Refi

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	FNT Seattle NCS		514309	COMD1146.doc

New document. Render to view complete document.

GENERAL PROVISIONS

Company Name

Escrow Office Name
100 Main Street
Place, WA 92025
Phone: (800)111-2222 Fax: (800)222-3333

Date: January 17, 2019
Escrow No.: JM CD Test-MGS
Buyer(s): Bob L. Buyer and Betty A. Buyer
Property: 1 Property Address
City, WA 49503

CLOSING AGREEMENT AND ESCROW INSTRUCTIONS
For Loan Transactions Including Refinance

The undersigned borrower and lender (referred to herein as "the parties") hereby designate and appoint Escrow Office Name (referred to herein as "Escrow Holder") to act as their closing agent according to the following agreements and instructions.

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General Provisions - Sale

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	FNT Seattle NCS		514309	COMD1147.doc

New document. Render to view complete document.

GENERAL PROVISIONS

Company Name

Escrow Office Name
100 Main Street
Place, WA 92025
Phone: (800)111-2222 Fax: (800)222-3333

Date: January 17, 2019
Escrow No.: JM CD Test-MGS
Buyer(s): Bob L. Buyer and Betty A. Buyer
Seller(s): Sam E. Seller and Sally A. Seller
Susan B. Seller
Property: 1 Property Address
City, WA 49503

CLOSING AGREEMENT AND ESCROW INSTRUCTIONS
For Purchase and Sale Transaction

The undersigned buyer and seller (referred to herein as "the Parties") hereby designate and appoint Escrow Office Name (referred to herein as "Escrow Holder") to act as their closing agent according to the following agreements and instructions.

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Title

ALTA Commitment 2016 (DC, VA, MD)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	CT DC NCS		516126	

New prompt added for Co-Insurance language on Commitment and Policies.

SCHEDULE A

Name and Address of Title Insurance Company: Joseph D. Kirby
Title Office Name
1 Title Office Street
City, DC 70808
Phone: (888)111-2222

Address Reference: 1001 Property Address, City, DC 49503

Date of Policy	Amount of Insurance
DATE OF FUNDING	$275,000.00 which represents 5.00% of the total liability of $5,000.00 reflected on the attached ALTA 23-06 Endorsement with Co-Insuring Underwriter Name

Enter the co-insuring Underwriter

Co-Insuring Underwriter Name

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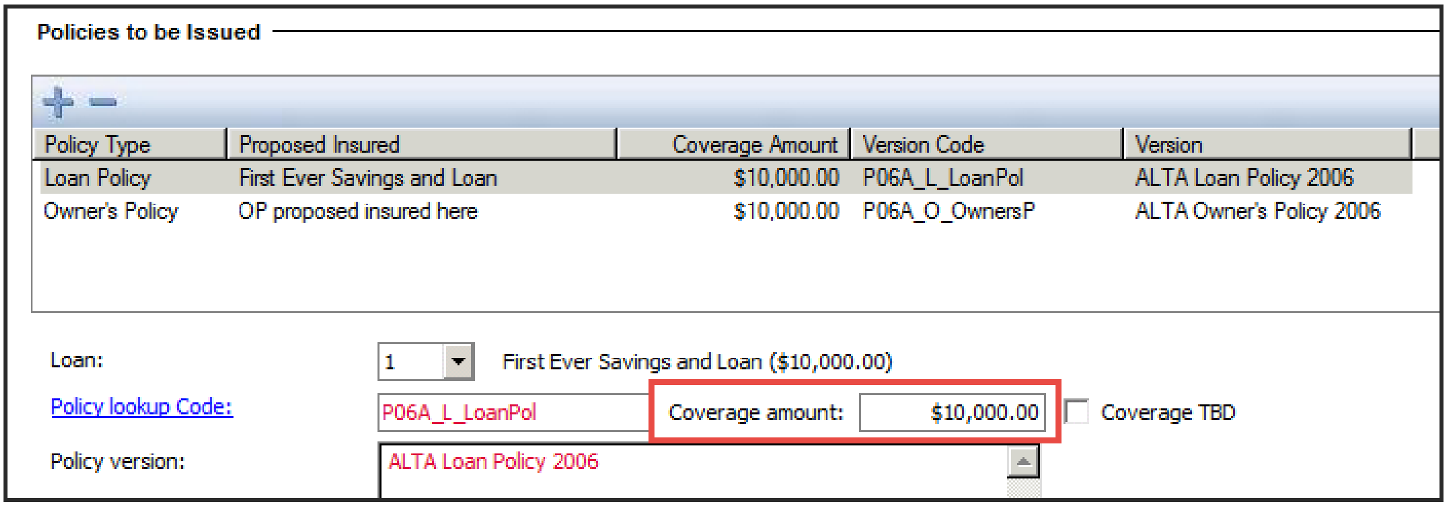
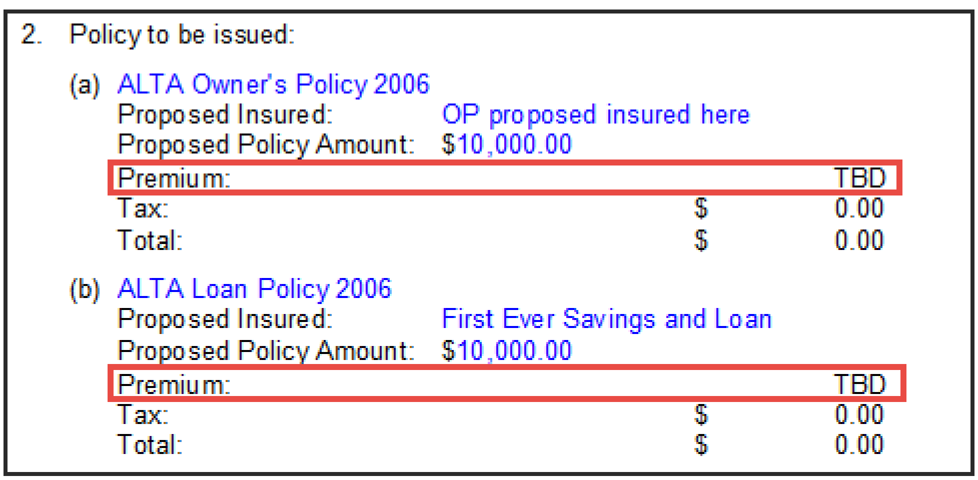
ALTA Commitment 2016 (WA)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Seattle NCS		522196	

FT NCS Seattle ONLY: Updated Item 2 - Policy to be issued - Premium line to show as "TBD" if related policy coverage amount = $10,000.00.




2. Policy to be issued:

(a) ALTA Owner's Policy 2006
Proposed Insured: OP proposed insured here
Proposed Policy Amount: $10,000.00
Premium: TBD
Tax: $ 0.00
Total: $ 0.00

(b) ALTA Loan Policy 2006
Proposed Insured: First Ever Savings and Loan
Proposed Policy Amount: $10,000.00
Premium: TBD
Tax: $ 0.00
Total: $ 0.00

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ALTA Loan Policy 2006 (DC, VA, MD)
ALTA Owner's Policy 2006 (DC, VA, MD)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT DC NCS		516126	

New prompt added for Co-Insurance language on Commitment and Policies.

SCHEDULE A

Name and Address of Title Insurance Company: Joseph D. Kirby
Title Office Name
1 Title Office Street
City, DC 70808
Phone: (888)111-2222

Address Reference: 1001 Property Address, City, DC 49503

Date of Policy	Amount of Insurance
DATE OF FUNDING	$275,000.00 which represents 5.00% of the total liability of $5,000.00 reflected on the attached ALTA 23-06 Endorsement with Co-Insuring Underwriter Name

Enter the co-insuring Underwriter

Co-Insuring Underwriter Name

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REPORTS

Closed Orders by Sales Rep

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		516353	

- Updated parameter screen from single date drop down to use a from and through.
  - Closed date from - default to 1st day of prior month
  - Closed date through - default to last day of prior month
- If the report is run with the defaulted dates the MTD columns would all retain the naming convention of "MTD xxxxx"
- If the dates are changed to something else those columns names will be updated to show as "Range xxxx"
- YTD columns will use the YTD based off of the through date selected.

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Marketing Source Activity

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		503940	

- On parameter screen: If the profile path contains '%\NCS\%', then the days on parameter will default to 90 (current default is 60)
- On parameter screen: added new check box called "Premium Only Revenue:", defaulted to unchecked and placed under the show order details checkbox. If checked report will only return TP & END Bill codes, and CRRAR Rev field {{Order.CRRARRev_FNF#}}
- On parameter screen: addede new check box called "Use Property Count:", defaudlt to unchecked and placed under new Premium Only Revenue checkbox. If checked report will return the count of properties in each order for closed and open counts
- If profile path contains '%\NCS\%', then CRRAR Rev field {{Order.CRRARRev_FNF#}} will be included in the revenue column.

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Open/Closed Pipeline

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		515913	

- Updated the "Liability amounts (commercial format only)" from Sum of Liabilities to Highest Liability

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Orders by Status

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		505947	

On parameter screen:

- Added a new checkbox called "Commercial Format:" and default to checked. If profile path contains '%\NCS\%', else default to unchecked. Placed between page break per group 1 and contact file drop down.
- In the Group by drop down added two additional options: 'Branch, Sales Rep' and 'Sales Rep, Marketing Source'
    - If commercial format is checked show the following columns
    - Order Number
    - Open date
    - Closed date
    - Status Date
    - Trans. Type
    - Order Type/Prod. Type
    - Prop. Use/Prop State (pull from property 1)
    - Escrow Officer/Title Officer
    - Sales Rep/Marketing Source
    - Owners Liability/Lenders Liability (pull the sum of the coverage amount for the owners and lender. If either of these are NULL pull sales price for owners and sum of loan amounts for lenders)
    - Total Revenue*/Premium Only(revenue sum of all bill codes that have a GL code of 4 + CRRAR Rev field and premium is sum of TP & END bill codes + CRRAR Rev field)
    - Footer note for Total Rev * - will be all revenue including premium

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Trending by Selection

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS		505939	

- Added a new check box parameter call "Use Property Count:", defaulted to unchecked, placed between show order details and use alternate bill codes checkboxes, when check box is checked report will return the sum of the number of properties in each order as the opened and closed counts
- If profile path contains '%\NCS\%', then revenue will show as all fees with a GL code beginning with a 4.
- In the revenue row added CRRAR Rev {{Order.CRRARRev_FNF#}} as part of the sum

- Added a new row under Revenue called "Premium" and shows only TP & END bill codes plus CRRAR Rev field. Added footer note about Premium = TP, END, CRRAR Rev

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DC

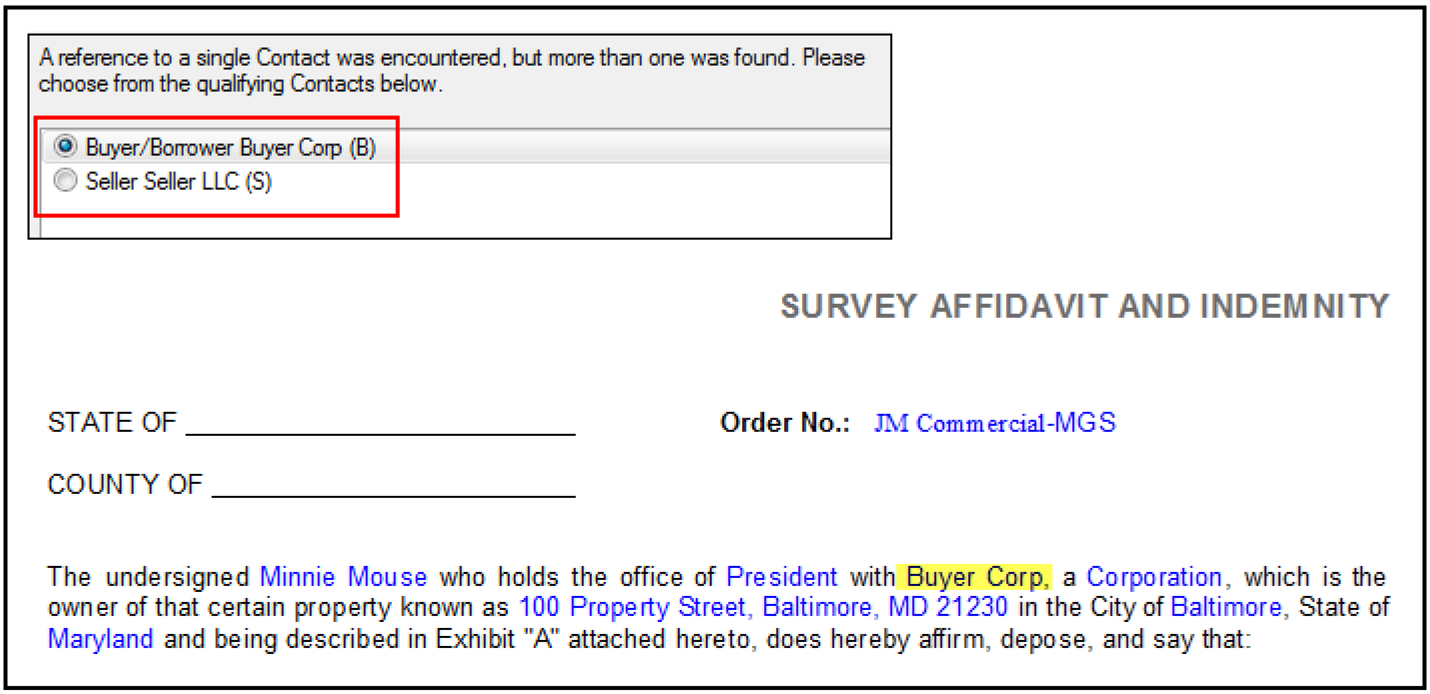
DOCUMENTS

Escrow

Affidavit (Survey)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT DC NCS		520018	

Updated form to allow user to choose between Buyers and Sellers, if Purchase file.


A reference to a single Contact was encountered, but more than one was found. Please choose from the qualifying Contacts below.

Buyer/Borrower Buyer Corp (B)
Seller Seller LLC (S)

SURVEY AFFIDAVIT AND INDEMNITY

STATE OF ____________________ **Order No.:** JM Commercial-MGS

COUNTY OF ____________________

The undersigned Minnie Mouse who holds the office of President with Buyer Corp, a Corporation, which is the owner of that certain property known as 100 Property Street, Baltimore, MD 21230 in the City of Baltimore, State of Maryland and being described in Exhibit "A" attached hereto, does hereby affirm, depose, and say that:

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FLORIDA

DOCUMENTS

Escrow

Affidavit (Attorney in Fact) FKA Affidavit (Durable Power of Attorney)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FL State Counsel		519958	

Updated document to match most recent version provided by FL State Counsel. Title of document has also been changed to "Affidavit (Attorney in Fact)".

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Affidavit (Borrower's - Commercial)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	Majesty Title		514926	FLD1333.doc

New document. Render to view complete document.

BORROWER'S AFFIDAVIT
(Commercial)

STATE OF ____________________________ **Order No.:** JM CD Test

COUNTY OF __________________________

Before me, the undersigned authority, personally appeared Minnie Mouse (whether one (1) or more, hereinafter referred to as "Affiant"), who, being duly sworn according to law, deposes and says:

1. OWNERSHIP AND DESCRIPTION OF TRANSACTION. This affidavit is made in connection with a mortgage of the Property to Leonard's Lending Services ("Lender"). Affiant is the President of Buyer Corporation ("Borrower"), which is the owner of the land described as follows (the "Property"):

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

2. AUTHORITY TO EXECUTE DOCUMENTS. Affiant has authority to execute the proposed mortgage by Borrower in favor of Lender.

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Affidavit (Borrower's - Residential)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	Majesty Title		514926	FLD1334.doc

New document. Render to view complete document.

BORROWER'S AFFIDAVIT
(Residential)

STATE OF ______________________________ **Order No.:** JM CD Test

COUNTY OF ____________________________

Before me, the undersigned authority, personally appeared Bob L. Buyer and Betty A. Buyer (whether one (1) or more, hereinafter referred to as "Affiant"), who, being duly sworn according to law, deposes and says:

1. OWNERSHIP AND DESCRIPTION OF TRANSACTION. This affidavit is made in connection with a mortgage of the Property to Leonard's Lending Services ("Lender"). Affiant is the owner of the land described as follows (the "Property"):

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

2. LIENS, MORTGAGES AND ENCUMBRANCES. The Property is not subject to any mortgages, liens, restrictions, easements or other matters, except those shown on Commitment No. CN123 and property taxes for the tax year 2019.

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Affidavit (LLC) Legal

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	Majesty Title		515857	FLD1338.doc

New document. Render to view complete document.

Prepared by and Return To:
Carly L. Robidoux
Majesty Title Services
4006 S. MacDill Ave.
Tampa, FL 33611

Order No.: 08251982

APN/Parcel ID(s): 11111111APN
Tax/Map ID(s): 11111TaxMapID

LIMITED LIABILITY COMPANY AFFIDAVIT

Before me, the undersigned authority, personally appeared Sean T. Seller ("Affiant"), who, being duly sworn according to law, deposes and says:

1. Affiant is a ☐ member or ☐ manager of Seller Company, Inc. (the "LLC").
2. The LLC is currently in existence under valid articles of organization and regulations and has not been terminated or dissolved.
3. The LLC is the owner of the following described real property:

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF
4. The conveyance or mortgage by the LLC is to an unrelated person or entity for value.

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Affidavit (Non-Identity)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	Majesty Title		517391	

Updated per State Counsel

NON-IDENTITY AFFIDAVIT

BEFORE ME, the undersigned authority, personally appeared Bob L. Buyer, ("Affiant") who, being duly sworn according to law, deposes and says:

1. Affiant has personal knowledge of the facts contained herein and is the owner of the following described property:

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

2. No judgments or liens have been recorded against Affiant. Further, any judgment or lien of record against the same or similar name is against another person.

3. Affiant is not the person who is the debtor in the following recorded documents:

   Name goes here

4. Under penalties of perjury, Affiant declares that he/she has read the foregoing document and that the facts stated in it are true.

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Affidavit (Non-Identity Blank Form)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	Majesty Title		517391	FLD1339.doc

New document. Render to view complete document.

NON-IDENTITY AFFIDAVIT

BEFORE ME, the undersigned authority, personally appeared Bob L. Buyer, ("Affiant") who, being duly sworn according to law, deposes and says:

1. Affiant has personal knowledge of the facts contained herein and is the owner of the following described property:

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

2. Affiant certifies that no judgments or liens have been recorded against Affiant. Further, any judgment or lien of record against the same or similar name is against another person.

3. Under penalties of perjury, Affiant declares that he/she has read the foregoing document and that the facts stated in it are true.

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Affidavit (Seller's - Commercial)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	Majesty Title		514926	FLD1335.doc

New document. Render to view complete document.

SELLER'S AFFIDAVIT (Commercial)

STATE OF ____________________________ **Order No.:** JM CD Test

COUNTY OF __________________________

Before me, the undersigned authority, personally appeared Mickey Mouse (whether one (1) or more, hereinafter referred to as "Affiant"), who, being duly sworn according to law, deposes and says:

1. OWNERSHIP AND DESCRIPTION OF TRANSACTION. This affidavit is made in connection with a sale of the Property to Bob L. Buyer, Betty A. Buyer and Buyer Corporation ("Purchaser"). Affiant is the VP of Seller Corporation ("Seller"), which is the owner of the land described as follows ("Property"):

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

2. AUTHORITY TO EXECUTE DOCUMENTS. Affiant has authority to execute the deed conveying the Property.

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Affidavit (Seller's - Residential)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	Majesty Title		514926	FLD1336.doc

New document. Render to view complete document.

SELLER'S AFFIDAVIT
(Residential)

STATE OF ____________________________ **Order No.:** JM CD Test

COUNTY OF __________________________

Before me, the undersigned authority, personally appeared Sam E. Seller and Sally A. Seller (whether one (1) or more, hereinafter referred to as "Affiant"), who, being duly sworn according to law, deposes and says:

1. OWNERSHIP AND DESCRIPTION OF TRANSACTION. This affidavit is made in connection with a sale of the Property to Bob L. Buyer, Betty A. Buyer and Buyer Corporation ("Purchaser"). Affiant is the owner of the land described as follows ("Property"):

   SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

2. LIENS, MORTGAGES AND ENCUMBRANCES. The Property is not subject to any mortgages, liens, restrictions, easements or other matters, except those shown on Title Commitment No. CN123 and property taxes for the tax year 2019.

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Affidavit (Seller's Title - All Sellers)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	FL		517970	

Corrected typo of the word "ASSOCIATION" in item 11.

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Notice of Termination with Contractor's Affidavit

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	Majesty Title		520559	

Document will now look to the affidavit screen for the affiant information. If it is left empty, it will continue to function as it did before.

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Power of Attorney (Mortgage)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	Majesty Title		514926	FLD1331.doc

New document. Render to view complete document.

Prepared by and Return To:
Melissa G. Smith
Escrow Office Name
100 Main Street
Place, FL 92025

POWER OF ATTORNEY
MORTGAGE

KNOW ALL PERSONS BY THESE PRESENTS:

I, Bob L. Buyer (the "Principal"), make, constitute and appoint POA for Bob (the "Attorney-in-Fact"), as my true and lawful attorney, for me and in my name, place and stead, hereby granting my Attorney-in-Fact, specific power and authority to do and perform any and all acts whatsoever requisite and necessary to be done in connection with the Purchase Money Mortgage or Refinance through Leonard's Lending Services (the "Lender") to encumber the following real property:

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Power of Attorney (Sale)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	Majesty Title		514926	FLD1332.doc

New document. Render to view complete document.

Prepared by and Return To:
Melissa G. Smith
Escrow Office Name
100 Main Street
Place, FL 92025

POWER OF ATTORNEY
SALE

KNOW ALL PERSONS BY THESE PRESENTS:

I, Sam E. Seller (the "Principal"), do hereby make, constitute and appoint POA Name for Sam (the "Attorney-in-Fact"), as my true and lawful attorney, for me and in my name, place and stead, hereby granting my Attorney-in-Fact, specific power and authority to do and perform any and all acts whatsoever requisite and necessary to convey, sell, transfer title to Bob L. Buyer and Betty A. Buyer, (the "Buyer"), or otherwise dispose of the following described real property, and any appurtenances thereto:

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Proceeds Disbursement

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	Majesty Title		515864	

Adjusted the vertical spacing on the document to ensure it keeps to one page.

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Tax Agreement

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	Majesty Title		514926	FLD1337_MT.doc

New document. Render to view complete document.

TAX AGREEMENT

Company Name

Date: January 24, 2019
Order No.: JM CD Test
Seller(s): Sam E. Seller and Sally A. Seller
Buyer(s): Bob L. Buyer and Betty A. Buyer
Property: 1 Property Address, City, FL 49503

I/We, the undersigned seller(s) of the above captioned property hereby warrant:

- ☐ That I/we were residing at the subject property as of October 12, 2018 as a Florida resident. That I/we did not make any changes in our residency as of October 12, 2018 that would result in denial of homestead exemption for the year of closing.
- ☐ The subject property does not have homestead exemption for the year 2018.

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Termite Waiver

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	Majesty Title		521253	

Removed acknowledgment to mimic the Survey Waiver.

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REPORTS

Commissions Report

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
NEW	FT FL		515868	SSCORP5386.rpt

General:
Title – Commission Report
Tree location – custom FL folder

Parameters:
- Closed date from
  - default to 1st day of prior month
- Closed date through
  - default to last day of prior month
- Page break on group 1, default to checked
- Group by transaction type checkbox, default to unchecked
- Show group totals only checkbox, default unchecked
  - when checked just returns groups with totals
- Include avg. days to close checkbox, default to unchecked
- Show property address, default to unchecked
- Excel Export checked box, default to unchecked
- Branch Picklist
- Sales Rep Picklist
- Order Type Picklist
- Product Type Picklist
- Show report programming notes
- Report comments

Groups:
- sales rep – separated,
- then transaction type if box is checked

Columns:
- Order Number – {{Order.Number}}
- Trans. Type – {{Order.TransactionType}}
- Order Type – {{Order.Type}}
- Closed Date – WSOB Closed
- EO/Closer – {{Order.Escrow.Officer.Name}}
- TO/Examiner – {{Order.Title.Officer.Name}}
- Sales Rep –name of sales rep, if more than one concatenate with comma separated
- Marketing Source Company –contact name of marketing source, if more than one concatenate with comma separated
- Marketing Source Contact – name of main contact person from marketing source, if more than one concatenate with comma separated
- Liability – policy type {{Order.PolicyType}} =
  - Owners only or simultaneous, show owners coverage amount. If coverage amount is NULL show sales price
  - loan only, show loan coverage amount. if coverage amount is NULL show sum of loan amounts
- Title Revenue – sum of all TP bill codes
- End. Revenue – sum of all END bill codes
- Total Revenue – sum of Title and END revenue

Additional rows:

- If Show property address box is checked insert additional row under each order, slightly indented
- Label as “Property:” and bold label text
- property – show property address pulling from property 1 {{Order.Properties[1].Address.FullAddress}}

Totals:

- Per group and report
  - order count
  - Liability
  - Title Revenue
  - End. Revenue
  - Total Revenue

Sorting:

- alphabetically by sales rep
- alphabetically by transaction type, if grouped by transaction type
- order number

Logic:

- pull all orders closed in the date range using the WSOB closed date definition

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HAWAII

DOCUMENTS

Escrow

Info Regarding Your Escrow Transaction				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
Mod	FT HI		516832	

Updated first paragraph.

APPROVED NOTARY:

In our continuing effort to protect all parties in our transactions, Escrow Office Name has implemented an "Approved Notary" requirement. Only notaries who have completed an extensive approval process by Escrow Office Name (background checks, insurance and bonding standards, etc.) may notarize documents within your escrow transaction. Employees of Escrow Office Name or its sister companies are all approved notaries. If you are unable to sign with an employee of Escrow Office Name or its affiliates, we will assist in arranging a signing appointment with an approved notary. If you are signing under the supervision of an attorney, please provide us the attorney's name and contact information. Please note additional fees may apply if an outside approved notary service is required.

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ILLINOIS

Title

SE 269 - Date Down 1L (Loan)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	Underwriting	n/a	518598	

At the direction of underwriting counsel, the endorsement has been updated to add creditors' rights language.

This endorsement does not insure against loss or damage, and the Company will not pay costs, attorneys' fees, or expenses, by reason of any claim that arises out of the transaction creating the Modification by reason of the operation of federal bankruptcy, state insolvency, or similar creditors' rights laws that is based on:

1. the Modification being deemed a fraudulent conveyance or fraudulent transfer; or
2. the Modification being deemed a preferential transfer except where the preferential transfer results from the failure
    - i. to timely record the instrument of transfer; or
    - ii. of such recordation to impart notice to a purchaser for value or to a judgment or lien creditor.

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REPORTS

Iman Import

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CT IL		511295	

- Added three new columns to the end of the report (if they exist):
  - New Column that will be called "LineItemGUID" and will pull the GUID of the invoice line description for each row
  - New column that will be called "CustomerGUID" and will pull the GUID of the Customer Main Account column for each row
  - New column that will be called "OrderNumberGUID" and will pull the GUID of the order number for each row.

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Title Production

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CT IL		516173	

- Added new start and stop times for IL:

  Start:
  - Checklist Task Contains “A1 Order Opened”
  - Search for checklist task: %A1 Order Opened%
  - Checklist Task Contains “A2 Order Bucket Assignment”
  - Search for checklist task: %A2 Order Bucket Assignment%
  - Checklist Task Contains “A2a Order Assigned To”
  - Search for checklist task: %A2a Order Assigned To%
  - Checklist Task Contains “A3 Billing”
  - Search for checklist task: %A3 Billing%
  - Checklist Task Contains “A4 Order Completed”
  - Search for checklist task: %A4 Order Completed%
  - Checklist Task Contains “A5 Typing”
  - Search for checklist task: %A5 Typing%
  - Checklist Task Contains “A6 Delivery”
  - Search for checklist task: %A6 Delivery%
  - Checklist Task Contains “H01 Vendor Search Ordered”
  - Search for checklist task: %H01 Vendor Search Ordered%
  - Checklist Task Contains “H01a Vendor Search Received”
  - Search for checklist task: %H01a Vendor Search Received%

  Stop:
  - Checklist Task Contains “A2 Order Bucket Assignment”
  - Search for checklist task: %A2 Order Bucket Assignment%
  - Checklist Task Contains “A2a Order Assigned To”
  - Search for checklist task: %A2a Order Assigned To%
  - Checklist Task Contains “A3 Billing”
  - Search for checklist task: %A3 Billing%
  - Checklist Task Contains “A4 Order Completed”
  - Search for checklist task: %A4 Order Completed%
  - Checklist Task Contains “A5 Typing”
  - Search for checklist task: %A5 Typing%

- Checklist Task Contains “A6 Delivery”
- Search for checklist task: %A6 Delivery%
- Checklist Task Contains “H01 Vendor Search Ordered”
- Search for checklist task: %H01 Vendor Search Ordered%
- Checklist Task Contains “H01a Vendor Search Received”
- Search for checklist task: %H01a Vendor Search Received%

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INDIANA

DOCUMENTS

Escrow

Agreement (Borrower Estimated 1st Installment Real Estate Tax)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Indy Metro		522071	

Updated first paragraph to read:
"In consideration of <company name> completing and funding the purchase/refinance of the above property by the undersigned Borrower(s) (hereinafter referred to as "Borrower"), the Borrower acknowledges and agrees as follows:"

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Client Care Checklist

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT IN		521240	

If a contact type is not entered in the file, the section for the contact will collapse to save vertical space.

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Cover Page (FTNW)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FT NW IN		516187	

Removed reference to the Hobart branch and updated the website to northwestindiana.fntic.com.

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REO - Hold Harmless

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT IN		518378	

Revised language "in the Indiana Code Title 36" to "per state code".

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REPORTS

Weekly Source of Business				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
MOD	CT IN		516969	

- Construction Disbursement orders were not showing as indirect for FCTM IN. This was due to the profile path in the report using FT instead of CT.
- Current: Profile "Default\P\CPU\Indiana**FT**\FCTM" and descendants = INFO, PLTACC, CD, OTHER, TTLSEA
- Corrected: Profile "Default\P\CPU\Indiana**CT**\FCTM" and descendants = INFO, PLTACC, CD, OTHER, TTLSEA

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MARYLAND

DOCUMENTS

Escrow

Affidavit (Yield Tax Exemption - Baltimore City)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	CT DC Baltimore NCS		520720	MDD1048.doc

New document. Render to view complete document.

City of Baltimore
Department of Finance
Bureau of Revenue Collections

AFFIDAVIT-YIELD TAX EXEMPTION

Property Address: 100 Property St, City, MD 12345 W/S/B/L ____________________

The undersigned hereby certifies the following under the penalties of perjury in order to establish eligibility for an exemption from the Yield Tax imposed by BALTO. CITY CODE, ART. 28, SUB. 17.1.

SELECT EITHER ITEM 1 OR ITEM 2 BELOW; STRIKE THROUGH INAPPLICABLE ITEM. ITEM 1.

Exemption for Mortgage or Deed of Trust Submitted for Recordation Prior to July 11, 2019

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MICHIGAN

DOCUMENTS

Escrow

Master ABA Disclosure				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
Mod	CT MI		521579	

The following ABAs have been added or updated:

1STK2180
JHRA545
KELP653
REMG133
REMG6255

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NEW MEXICO

DOCUMENTS

Escrow

Agreement (Tax Proration and HOA)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FT NM		515869	

Re-ordered the 2nd set of signatures and listed the notary acknowledgments to come after that set. Also added HOA to the title of the document.

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MY SCREENS

Order Entry and Property Screens

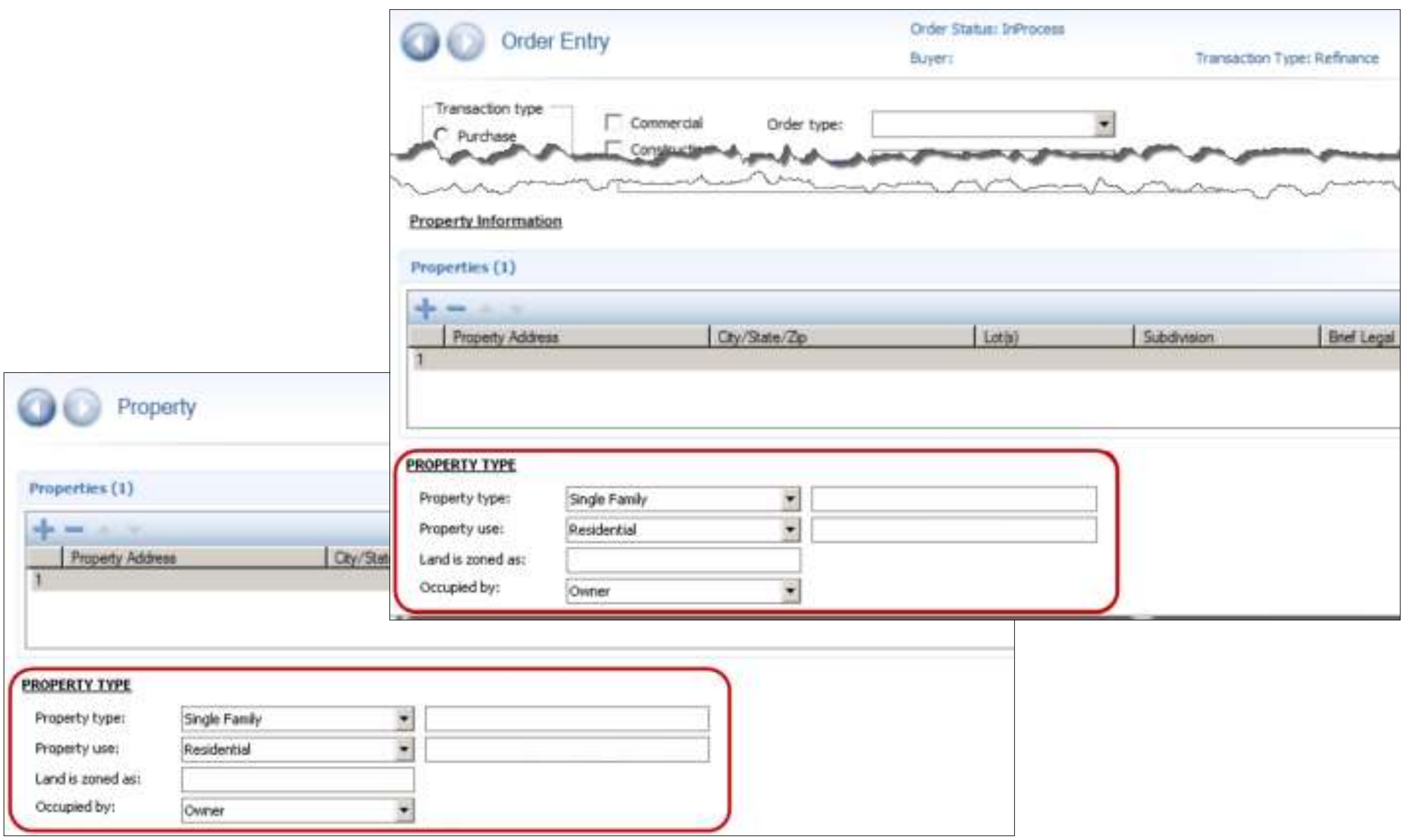
NEW/MOD	REQUESTED BY	FOOTPRINTS NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	Lynda McCutcheon			

The Property Type fields have been,

- added to the Order Entry screen below the Properties grid
- moved on the Property screen to immediately below the Properties grid

These field are available when using My Screens:

- NM All Screens
- NM Commercial
- NM Commercial CSS
- NM Escrow Screens
- NM Title Screens



My Screens

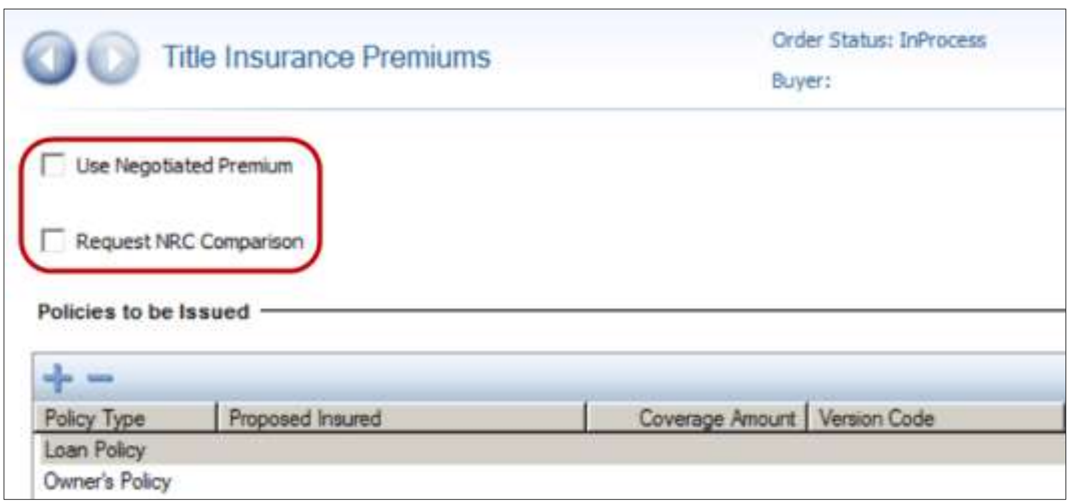
Title Insurance Premiums Screen				
New/Mod	**Requested By**	**Footprints No(s).**	**TFS No(s).**	**File Name (new items only)**
Mod	Karen Bennelli			

Two new fields have been added to the Title Insurance Premiums screen,

- Use Negotiated Premium
- Request NRC Comparison

These fields are available when one of the following My Screens is selected.

- NM All Screens
- NM Commercial
- NM Commercial CSS
- NM Escrow Screens
- NM Title Screens



My Screens

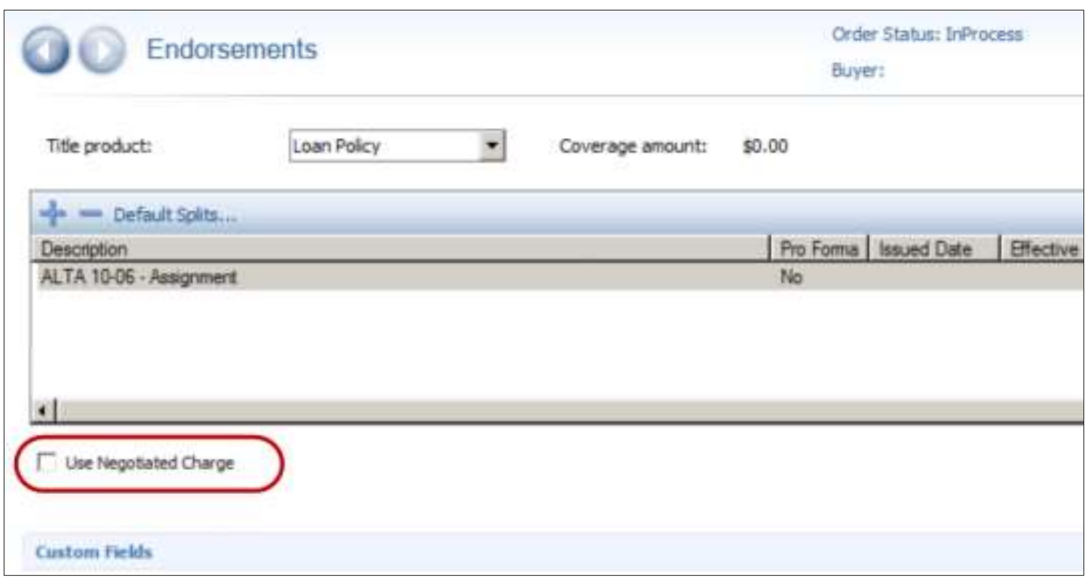
Endorsements Screen				
New/Mod	Requested By	Footprints No(s).	TFS No(s).	File Name (new items only)
Mod	Karen Benelli			

A new field has been added to the Endorsements screen,

- Use Negotiated Charge

This field is available when one of the following My Screens is selected.

- NM All Screens
- NM Commercial
- NM Commercial CSS
- NM Escrow Screens
- NM Title Screens



FEBRUARY
RELEASE NOTES

NEW YORK

DOCUMENTS

Escrow

Affidavit (Title)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Riverhead		520782	

Updated to 2019 version.

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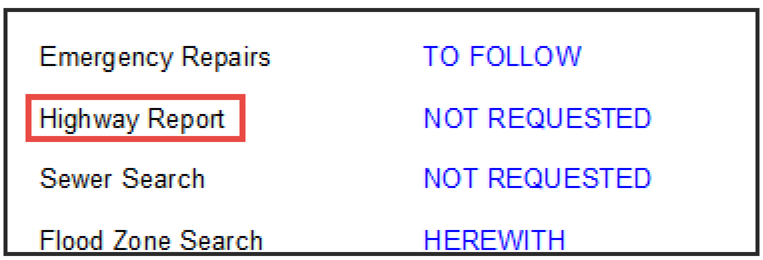
Departmental Searches

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Garden City		518594	

Removed "s" from "Highways Report" on document and custom field label.



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NY Application

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	NY		518754	

- Updated document service fee for Riverhead (FRVH) and Garden City (FGWH) to show the default as 25.00

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NY Title Bill

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	CT NY		515964	

- On the Albany Title Bill version removed 228.5 disclosure on page 2

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Rate Reduction Notice (Eff. 2-15-19)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	CTI Northern NY		522441	NYD1600.doc

New document. Render to view complete document.

In accordance with Regulation 208 issued by the New York State Department of Financial Services, an amended rate filing was submitted to the DFS by the Title Insurance Rate Service Association. As of February 15, 2019, a 5% reduction in title premiums for both Owner's and Loan Policies will be in effect. The new rates will apply to any transaction that closes on or after that date. We are not permitted to generate invoices/acknowledgements reflecting the new premium rates until February 15, 2019. If this transaction closes after that date please contact us to have a new invoice/acknowledgement calculated and sent to you. Thank you for your understanding, your patience and, of course, your continued trust in Chicago Title.

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Second Review Compliance Form

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	FNT Riverhead		520218	NYD1616.doc

New document. Render to view complete document.

Company Name

CORPORATE TITLE FILE SECOND REVIEW COMPLIANCE FORM

GUIDELINES: The Authority Parameters Memo (APM) requires a Second Review of any of the following title orders:

Second Review required for ALL policies, regardless of amount for the following matters:

- All requests for the deletion of a Schedule B coinsurance exception;
- Removal of any Schedule B exception which appeared in a prior policy when no justification is given for the deletion of the exception;
- All orders involving a change in the use of the Land;
- Insurance against a final court order enjoining construction of improvements due to a violation of the covenants, conditions and restrictions;
- Any non-standard [additional] insurance;
- Insurance of riparian rights or ownership of Land under lakes, rivers or streams;
- Insuring Land without a verified access;
- Insurance over an easement;
- Gap or overlap issues.

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Title

Master Endorsement (NY - All)

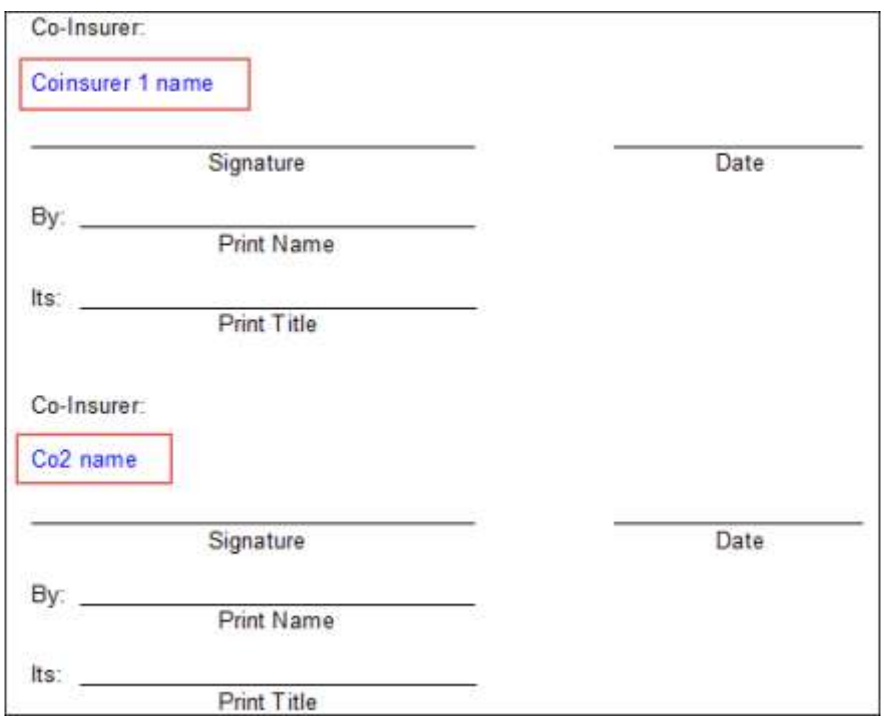
NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Garden City		512155	

Separated Co-Insurer name and address field into two separate fields so name field can flow to signature section.

Custom Fields

Search

Label	Value
Enter Issuing Co-Insurer name	Issuing name
Enter Issuing Co-Insurer address	Issuing address 1Issuing address2
Enter Issuing Co-Insurer policy number	Issuing policy num
Enter Issuing Co-Insurer amount of insurance	$12,345.00
Enter Issuing Co-Insurer portion of liability	21.32
Enter Co-Insurer 1 name	Coinsurer 1 name
Enter Co-Insurer 1 address	Co-1 add1Co-1 add2
Enter Co-Insurer 1 policy number	1111
Enter Co-Insurer 1 amount of insurance	$111.00
Enter Co-Insurer 1 portion of liability	11.00
Enter Co-Insurer 2 name	Co2 name
Enter Co-Insurer 2 address	Co-2 add1Co-2 add2



Co-Insurer:

Coinsurer 1 name

Signature — Date

By: Print Name

Its: Print Title

Co-Insurer:

Co2 name

Signature — Date

By: Print Name

Its: Print Title

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Title Affidavit

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	FNT Garden City		520735	NYD1617.doc

New document. Render to view complete document.

TITLE AFFIDAVIT

STATE OF ______________________

COUNTY OF ______________________

Title No.: JM CD Test2
Premises: 100 Property Address
City, NY 12345

The undersigned, being duly sworn, depose(s) and state(s) as follows:

1. I/We am/are the Seller of the premises known as 100 Property Address, City, NY 12345.
2. There are presently two (2) tentants in said premises.
   A. Each of the said tenants either (1) is in possession under a lease containing a standard clause fully and unconditionally subordinating said lease to all existing and future mortgages, or (2) is/are statutory tenants; or
   B. Said premises are a one family dwelling wholly occupied by me and my immediate family with no other persons in possession
3. There are no outstanding leases written or otherwise, on the subject premises.

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NORTH CAROLINA

DOCUMENTS

Title

Master Commitment
Master Endorsement
Master Loan Policy
Master Owner's Policy

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod		FT NC	520213	

**** FT NC ONLY ****

Updated PROFORMA language in footer to be bold and 11pt font.

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OHIO

DOCUMENTS

Escrow

Affidavit (As To Title)				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
Mod	OH State Counsel		516857	

Replaced #12 with the following:

12. The Company is not indebted to the federal or state government or any other public authority for taxes, assessments, water or sewer bills or other charges that are presently due or delinquent and may become a lien against the Property, that no notice has been received as to adjustments or additions to real estate taxes or pending assessments against subject real estate, that there are no Board of Revision or Board of Tax Appeal cases pending or decided within the last ninety (90) days and all real estate taxes and/or taxes paid pursuant to Tax Increment Financing or Tax Abatement agreements, if any, are being paid through collection with the County Real Estate Tax Bills.

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DTE 100 - Real Property Conveyance Fee Statement (Lucas County)				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
New	CT OH		521070	OHD1421.doc

New document. Render to view complete document.

DTE 100
Rev. 1/14

REAL PROPERTY CONVEYANCE FEE STATEMENT OF VALUE AND RECEIPT

If exempt by Ohio Revised Code section 319.54(G)(3), use form DTE 100(EX).

Grantee or Representative Must Complete All Questions in This Section

Type or print all information. See instructions on reverse.

1. Grantor's name	Sam Seller and Sally Seller	Phone:	(817)555-1234
2. Grantee's name	Bob E. Buyer and Betty Buyer	Phone:	(817)555-2222
Grantee's address	1 Buyer Address, City, OH 59878		
3. Address of property	100 Property Address, City, OH 12345		
4. Tax billing address	1 Buyer Address, City, OH 59878		

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File Cover - Toledo

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	CT OH		520033	

Updated to most recent version.

Check List Items	Ordered	Rcvd	Check List Items	Ordered	Rcvd
Signed Purchase Agree			Authorization Letter		
Earnest Money			Welcome Call		
Pre-Closing Disclosure			Commission Letter LA		
Trust/Memo of Trust			Commission Letter SA		
Corporate Documents			Payoff No. 1		
Power of Attorney			Payoff No. 2		
Chain of Title			E&O		
Commitment Sent			Home Warranty		
Survey			Deed Prep		
Condo Letter/Assoc			Tax Sheet	S:	B:
CPL Sent			Legal Checked on Deed		
Rate Calculator			No Mortgage Letter		
Primary Residence ☐ Y/☐ N			Wire: Buyer/Lender		

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Form 1313: Borrower's/Seller's Affidavit to Title Company

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	OH State Counsel		516862	

Added highlighted language to item 5.

5. The Company is not indebted to the federal or state government or any other public authority for taxes, assessments, water or sewer bills or other charges that are presently due or delinquent and may become a lien against the Property, that no notice has been received as to adjustments or additions to real estate taxes or pending assessments against subject real estate, that there are no Board of Revision or Board of Tax Appeal cases pending or decided within the last ninety (90) days and all real estate taxes and/or taxes paid pursuant to Tax Increment Financing or Tax Abatement agreements, if any, are being paid through collection with the County Real Estate Tax Bills.

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NBU Application Form

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	CT OH		521707	

Added parcel to property information.

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Search Request

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	AmeriTitle		519549	

Revised so that if an order is Title Only, it will pull the logo and address of the Title Company in the header. Otherwise, the Escrow Office logo and address will appear.


Company Name

123 Title Way, Suite 400
Midland, OH 27665
Phone: (919)228-2727 / Fax: (888)171-7171

TITLE SEARCH REQUEST

Date: February 5, 2019
Escrow No.: JM CD Test2-MGS
To: Listing Company Awesom
From: Melissa G. Smith

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Water Status Request

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	Precision Title		519898	

Revised to show A3 contact.

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Title

Blank-CTT Endorsement

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	CT South/Central Ohio		521693	

Updated to show standard ALTA endorsement last paragraph text if endorsement attached to Policy.

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.

Chicago Title Insurance Company

Dated: PROFORMA

Countersigned By:

PROFORMA

Authorized Officer or Agent

This text now shows if attached to a Policy.

This endorsement is made a part of the commitment or policy. It is subject to all the terms of the commitment or policy and prior endorsements. Except as expressly stated on this endorsement, the terms, dates and amount of the commitment or policy and prior endorsements are not changed.

Chicago Title Insurance Company

Dated: October 30, 2018

Countersigned By:

Authorized Officer or Agent

This text remains if attached to a Commitment.

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REPORTS

Weekly Source of Business				
NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	FT OH		520723	

- Added Plant Access as indirect
    - If profile path = "Default\P\CPU\Ohio\FT\FILL" plus decesndents, then will show plant access (PLTACC) product type as indirect

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OKLAHOMA

DOCUMENTS

Escrow

Affidavit (Identity and Authorization)				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
Mod	CT OK		516768	

Added the contacts associated with the transaction as well as the sales price.

AFFIDAVIT OF IDENTITY AND AUTHORIZATION

STATE OF ____________________________ **Order No.:** JM CD Test-JDK

COUNTY OF __________________________

John Smith, (Affiant), of lawful age, first being duly sworn, upon my oath, deposed and says:

1. That John Smith is the President of Seller Corporation and is authorized to sign and consent for the sale of all documents including deeds, mortgages, closing documents as necessary to satisfy any and all requirements to complete the transaction between Seller Corporation and Bob L. Buyer and Betty A. Buyer in the amount of One Hundred Seventy-Five Thousand And No/100 Dollars ($175,000.00) for the property located at 1 Property Address, Edmond, OK 49503, and further described as Brief Legal Description, Adams County, Oklahoma.

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Generic Enclosure Letter - Title				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
Mod	CT OK		519901	

Revised signature section to pull digital signatures.

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Uniform Abstract Certificate (CTI)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT OK		518411	

Updated document per compliance with Oklahoma Abstractor's Board.

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Written Gap

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT OK		515201	

Updated to most recent version.

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REPORTS

Weekly Source of Business				
NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	FT OH		520723	
○ For OK: Removed Informational and Other from indirect. The only indirect product type that will show is 'Real Property Report'				

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OREGON

DOCUMENTS

Escrow

EI - Buyer's (EIS)
EI - Buyer's (EIS - Legal)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	LT Portland Commercial		521132	

Paragraphs will now only show if the new CF prompt is

☑ Select if there will be a new loan

GENERAL INSTRUCTIONS

The General Provisions attached to these instructions are part of these instructions.

Buyer agrees to provide new hazard insurance policy acceptable to lender and to authorize payment of premium through escrow unless a paid receipt is provided to escrow.

The items indicated by "POC" or "PAID" or "*" are included at the direction of the Lender for disclosure purposes only. The Escrow Holder/Settlement Agent has no knowledge of these expenditures, except as provided by the Lender. They have not and cannot be verified as to the amount, the payee, nor actual payment and no liability is assumed by the closing agent as to the validity and/or sufficiency thereof.

Upon request, you are instructed to furnish any broker or lender identified with this transaction or anyone acting on behalf of such broker or lender, any information concerning this escrow, copies of all instructions, amendments and statements.

All terms and provisions of the agreement between the parties, amendments or addenda thereto, have been complied with to the satisfaction of the undersigned parties or will be complied with outside this escrow.

New section

Any refund to be remitted as follows:

☐ Mail ☐ Hold for Pick Up ☐ Deposit to Account:

Bank: ______________________

Account No.: ______________________

Account Name: ______________________

ABA Routing No.: ______________________

Back to Table of Contents

EI - Sale (EIS)
EI - Sale (EIS - Legal)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	LT Portland Commercial		521088	

Paragraphs will now only show if the new CF prompts are checked

☑ Select if there will be a new loan

GENERAL INSTRUCTIONS

The General Provisions attached to these instructions are part of these instructions.

Buyer agrees to provide new hazard insurance policy acceptable to lender and to authorize payment of premium through escrow unless a paid receipt is provided to escrow.

The items indicated by "POC" or "PAID" or "*" are included at the direction of the Lender for disclosure purposes only. The Escrow Holder/Settlement Agent has no knowledge of these expenditures, except as provided by the Lender. They have not and cannot be verified as to the amount, the payee, nor actual payment and no liability is assumed by the closing agent as to the validity and/or sufficiency thereof.

☑ Select if there is existing debt

Seller is aware that interest on the existing loan(s) does not stop accruing at close of escrow, but continues until the actual day of receipt of the payoff by Lender.

Seller is aware that interest will accrue through weekends or holidays.

Seller is aware he/she/they are responsible for payment of all of such interest and will indemnify and hold Escrow Holder harmless in connection with the payment of such interest. In the event you are paying in full the balance due on an existing trust deed and if a reconveyance of the trust deed is not recorded within sixty (60) days of it being paid off, you are requested to release the trust deed pursuant to the provisions of ORS 86.720.

Upon request, you are instructed to furnish any broker or lender identified with this transaction or anyone acting on behalf of such lender, any information concerning this escrow, copies of all instructions, amendments or statements.

All terms and provisions of the agreement between the parties, amendments or addendums thereto, have been complied with to the satisfaction of the undersigned parties or will be complied with outside this escrow.

This section removed:

☐ TRANSFER ☐ All Net Proceeds, or ☐ $ ____________

TO: ____________

ATTN: ____________

Seller proceeds, or balance thereof, at closing shall be delivered as follows:

☐ Mail ☐ Hold for Pick Up ☐ Deposit to Account:

Bank: ____________

Account No.: ____________

Account Name: ____________

ABA Routing No.: ____________

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EI - Seller's (EIS)
EI - Seller's (EIS - Legal)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	LT Portland Commercial		521148	

Paragraphs will now only show if the new CF prompt is checked

☑ Select if there is existing debt

GENERAL INSTRUCTIONS

The General Provisions attached to these instructions are part of these instructions.

Seller is aware that interest on the existing loan(s) does not stop accruing at close of escrow, but continues until the actual day of receipt of the payoff by Lender.

Seller is aware that interest will accrue through weekends or holidays.

Seller is aware he/she/they are responsible for payment of all of such interest and will indemnify and hold Escrow Holder harmless in connection with the payment of such interest. In the event you are paying in full the balance due on an existing trust deed and if a reconveyance of the trust deed is not recorded within sixty (60) days of it being paid off, you are requested to release the trust deed pursuant to the provisions of ORS 86.720.

Upon request, you are instructed to furnish any broker or lender identified with this transaction or anyone acting on behalf of such broker or lender, any information concerning this escrow, copies of all instructions, amendments and statements.

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Escrow Instructions

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel		517980	

Affects the following documents:

- EI - Manufactured Home Buyer (EIS) / EI - Manufactured Home Buyer (EIS - Legal)
- EI - Manufactured Home Seller (EIS) / EI - Manufactured Home Seller (EIS - Legal)
- EI - Borrower's (EIS) / EI - Borrower's (EIS - Legal)
- EI - Buyer's (EIS) / EI - Buyer's (EIS - Legal)
- EI - Lender's (EIS) / EI - Lender's (EIS - Legal)
- EI - Master / EI - Master (Legal)
- EI - Sale (EIS) / EI - Sale (EIS - Legal)
- EI - Seller's (EIS) / EI - Seller's (EIS - Legal)

Revised the Non-Resident Alien language to new language:

16. NON-RESIDENT ALIEN
The Foreign Investment in Real Property Tax Act (FIRPTA), Title 26 U.S.C., Section 1445, and the regulations thereunder, when applicable, provide in part that a transferee (buyer) of a U.S. real property interest from a foreign person must withhold a statutory percentage of the amount realized on the disposition, report the transaction and remit the withholding to the Internal Revenue Service (IRS) within twenty (20) days after the transfer.

The following limitations on the escrow responsibilities of Escrow Holder apply, except to the extent that Escrow Holder is instructed to act, agrees to act and acts as a Qualified Substitute under FIRPTA or is instructed to act, agrees to act and acts as a transmitter of IRS forms and a withholding payment.

Escrow Holder will not determine, and will not aid in the determination of, whether the FIRPTA withholding provisions are applicable to the subject transaction. Escrow Holder will not furnish tax advice to any party to the transaction. Escrow Holder will not determine, and will not aid in the determination of, whether the transaction will qualify for a FIRPTA exception or exemption. Escrow Holder will not be responsible for the filing of any tax form with the IRS related to FIRPTA, and will not be responsible for collecting and holding any documentation from the buyer or seller on the buyer's behalf for the purpose of supporting a claim of an exception or exemption. Escrow Holder is not an agent for the buyer for the purposes of receiving and analyzing any evidence or documentation that the seller in the subject transaction is a U.S. citizen or resident alien. Escrow Holder is not responsible for the payment of this tax and/or any penalty and/or interest incurred in connection with FIRPTA, and such taxes are not a matter covered by the Owner's Policy of Title Insurance to be issued to the buyer. Escrow Holder is not responsible for the completion of any IRS document or form related to FIRPTA. The buyer is advised that (a) the buyer must independently make a determination of whether the contemplated transaction is subject to the withholding requirement; (b) the buyer bears full responsibility for compliance with the withholding requirement if applicable and for payment of any FIRPTA-related tax, interest, penalty or other expense that may be due on the subject transaction; (c) the buyer is responsible for the completion of any and all FIRPTA-related forms, including but not limited to applicable IRS documentation, and for the mailing of those forms; and (d) any FIRPTA-related form, document or information received from Escrow Holder is not tax or legal advice, should not be construed as such and should not be treated as a complete representation of FIRPTA requirements. Buyer should seek outside counsel from a qualified individual to determine any and all implications of FIRPTA and its regulations. The buyer's signature below is the buyer's acknowledgment of receiving this notice.

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FIRPTA - Certification of Non-Foreign Status by Entity

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	State Counsel		518028	ORD1482.doc

New document. Render to view complete document.

TEST
COMPANY
LOGO

**CERTIFICATION OF NON-FOREIGN STATUS
BY ENTITY TRANSFEROR
(EACH SELLER MUST COMPLETE A
SEPARATE CERTIFICATION)**

Escrow Agent (Qualified Substitute): Joseph D. Kirby
Escrow No.: JJ OR Test Multi-JDK

Section 1445 of the Internal Revenue Code, the Foreign Investment in Real Property Tax Act ("FIRPTA"), requires a Transferee (Buyer) of a U.S. real property interest to withhold tax if the Transferor (Seller) is a foreign person or entity. For U.S. tax purposes (including Section 1445), the owner of a disregarded entity (which has legal title to a U.S. real property interest under local law) will be the transferor of the property and not the disregarded entity. FIRPTA withholding is not required if Seller furnishes to Buyer a Certification of Non-Foreign Status signed under penalties of perjury, stating that the Seller is not a foreign person or entity, and containing the Seller's name, address, and U.S. Taxpayer Identification No.

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FIRPTA - Certification of Non-Foreign Status by Individual

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	State Counsel		518028	ORD1481.doc

New document. Render to view complete document.

TEST COMPANY LOGO

CERTIFICATION OF NON-FOREIGN STATUS BY INDIVIDUAL TRANSFEROR (EACH SELLER MUST COMPLETE A SEPARATE CERTIFICATION)

Escrow Agent (Qualified Substitute): Joseph D. Kirby
Escrow No.: JJ OR Test Multi-JDK

Section 1445 of the Internal Revenue Code, the Foreign Investment in Real Property Tax Act ("FIRPTA"), requires a Transferee (Buyer) of a U.S. real property interest to withhold tax if the Transferor (Seller) is a foreign person. FIRPTA withholding is not required if Seller furnishes to Buyer a Certification of Non-Foreign Status signed under penalties of perjury, stating that the Seller is not a foreign person, and containing the Seller's name, address, and U.S. Taxpayer Identification No.

Buyers who obtain Certifications from the Seller are exempt from FIRPTA withholding requirements unless the Buyer or Buyer's agent has knowledge that the Certification is false.

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FIRPTA - EI for Withholding (Remittance Required)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	State Counsel		518028	ORD1483.doc

New document. Render to view complete document.

Company Name

SUPPLEMENTAL ESCROW INSTRUCTIONS FOR FIRPTA WITHHOLDING (REMITTANCE REQUIRED)

Melissa G. Smith, Closing Specialist
Escrow Office Name
400 Escrow Office Street, Suite 100
EO Place, OR 22335
Phone: (800)111-1111 Fax: (800)111-2222

Date: January 30, 2019
Escrow No.: JM CD Test-MGS
Property: 100 Property Address
City, OR 12345

It has been determined by the Parties that one (1) or more of the Sellers in the above captioned transaction is a foreign transferor and may be subject to FIRPTA withholding under Section 1445 of the Internal Revenue Code.

A. Prior to close of escrow, Buyer shall submit to Escrow Agent completed Internal Revenue Service ("IRS") Tax Forms:

1. **8288** US Withholding Tax Return for Dispositions by Foreign Persons of U.S. Real Property Interests.
2. **8288-A (Copies a, b and c)** Statement of Withholding on Dispositions by Foreign Persons of U.S. Real Property Interests with respect to Section 1445 of the Internal Revenue Code.
3. **8821** Tax Information Authorization, appointing Escrow Office Name as appointee under Box 2 of the form.

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FIRPTA - EI Qualified Substitute

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	State Counsel		518028	ORD1486.doc

New document. Render to view complete document.

**SUPPLEMENTAL ESCROW INSTRUCTIONS
REGARDING CERTIFICIATION OF
NON-FOREIGN STATUS
APPOINTMENT OF QUALIFIED SUBSTITUTE
ACKNOWLEDGEMENT AND INDEMNITY
(No Remittance)**

Joseph D. Kirby, Closing Specialist
Western Title & Escrow
360 SW Bond Street, Suite 100
Bend, OR 97702
Phone: (541)389-5751 Fax: (541)330-1242

Date: February 7, 2019
Ref. No.: SettleRefNum33333
Escrow No.: MS Test OR 1-JDK
Property: 100 Property Street
Eugene, OR 97401

Seller hereby hands ESCROW AGENT herewith Seller's Certification of Non-Foreign Status. (If more than one Seller is shown above, each Seller has furnished a separate Certification unless the Certification does not apply to a particular Seller.)

Seller and Buyer hereby designate ESCROW AGENT as Qualified Substitute under Internal Revenue Code Section 1445(f)(6)(A), and instruct ESCROW AGENT to retain an electronic copy of the Certification(s) furnished by Seller for six (6) years after the closing date, and to furnish to Buyer at closing ESCROW HOLDER Statement of Qualified Substitute as provided in Section 1445(b)(9).

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FIRPTA - No T.I.N. Instructions

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel		518056	

Document has been revised to show the most recent version.

Company Name

INSTRUCTION TO REMIT F.I.R.P.T.A. WITHHOLDING WITHOUT TAXPAYER I.D. NUMBER FOR TRANSFEREE AND TRANSFEROR HOLD HARMLESS

Date: February 1, 2019
Escrow No.: EO1-JM CD Test2
Property: 100 Property Address
City, OR 12345
To: EO Name, "Escrow Holder"

The undersigned Buyer and Seller of this transaction, the Seller being a foreign transferor, have informed Escrow Holder that the undersigned transferor does not have a U.S. Taxpayer Identification Number (TIN), required by the U.S. Internal Revenue Service for the processing of all forms and taxes paid.

By notice herein Escrow Holder has informed all parties in this transaction as to the following:

- IRC Section 1445 ("FIRPTA") requires that the buyer(s) deduct and withhold a tax equal to, depending on certain circumstances, Ten Percent (10%) or Fifteen Percent (15%) of the amount realized on the disposition of US Real Property interest by a foreign transferor (FIRPTA Withholding).
- The buyer and seller of this transaction have determined that this transaction falls within the requirements of IRC Section 1445.
- IRC Section 1445 requires that a foreign transferor and transferee exchange U.S. TINs.
- The IRS may not accept or process any forms or taxes paid without a U.S. TIN.
- The transferee and/or transferor may not receive credit for any taxes paid to the IRS without a U.S. TIN.
- The IRS may hold the Buyer responsible for the payment of taxes, penalties and interest that may be incurred when such taxes are paid without a U.S. TIN.

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FIRPTA - Notice of Settlement Agent Responsibility

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	State Counsel		518028	ORD1484.doc

New document. Render to view complete document.

Company Name

NOTICE OF SETTLEMENT AGENT RESPONSIBILITY

Melissa G. Smith, Closing Specialist
Escrow Office Name
400 Escrow Office Street, Suite 100
EO Place, OR 22335
Phone: (800)111-1111 Fax: (800)111-2222

Date: January 30, 2019
Escrow No.: JM CD Test-MGS
Seller(s): Sam E. Seller and Susan Seller
Buyer(s): Bob Buyer and Betty Buyer
Property: 100 Property Address
City, OR 12345

The Foreign Investment in Real Property Tax Act (FIRPTA), Title 26 U.S.C., Section 1445, and the regulations thereunder, when applicable, provide in part that a transferee (buyer) of a U.S. real property interest from a foreign person must withhold a statutory percentage of the amount realized on the disposition, report the transaction and remit the withholding to the Internal Revenue Service (IRS) within twenty (20) days after the transfer.

The following limitations on the escrow responsibilities of Escrow Holder apply, except to the extent that Escrow Holder is instructed to act, agrees to act and acts as a Qualified Substitute under FIRPTA or is instructed to act, agrees to act and acts as a transmitter of IRS forms and a withholding payment.

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FIRPTA - Statement of Buyer's Intent to Use as Residence

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
New	State Counsel		518028	ORD1480.doc

New document. Render to view complete document.

Company Name

FIRPTA CERTIFICATION BY BUYER-TRANSFEREE REGARDING USE OF PROPERTY AS A PERSONAL RESIDENCE

Escrow No.: JM CD Test-MGS
Property: 100 Property Address, City, OR 12345

This form is provided so the Buyer in this transaction can certify compliance with Section 1445 of the Internal Revenue Code, the Foreign Investment in Real Property Tax Act (FIRPTA). The Buyer must retain a copy of this document until after the fifth taxable year following the transfer. USE THIS FORM ONLY IF THE BUYER INTENDS TO ACQUIRE THE PROPERTY AS A RESIDENCE.*

By signing below, I/we (Buyer) certify that I/we intend to acquire the property in this transaction for Buyer's use as a residence.*

CHECK THE BOX THAT APPLIES TO THIS TRANSACTION:

1. ☐ I/We certify that the amount realized (gross sale price or total consideration paid or given by Buyer to Seller) does not exceed Three Hundred Thousand And No/100 Dollars ($300,000.00).
2. ☐ I/We certify that the amount realized (gross sale price or total consideration paid or given by Buyer to Seller) exceeds Three Hundred Thousand And No/100 Dollars ($300,000.00) but does not exceed One Million And No/100 Dollars ($1,000,000.00).

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FIRPTA - Statement of Qualified Substitute

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
New	State Counsel		518028	

New document. Render to view complete document.

Company Name

STATEMENT OF ESCROW AGENT ACTING AS QUALIFIED SUBSTITUTE

Escrow No.: JM CD Test-MGS
Escrow Agent: Melissa G. Smith
Buyer(s): Bob Buyer and Betty Buyer
Seller(s): Sam E. Seller and Susan Seller
Property: 100 Property Address, City, OR 12345

The undersigned states under penalties of perjury that:

1. The above named ESCROW AGENT is the escrow agent that is responsible for closing the above referenced transaction.
2. I am an escrow officer employed by ESCROW AGENT, and I am authorized to sign this Statement.
3. Of all of the above named sellers, each of the following named sellers has furnished to ESCROW AGENT a completed, signed Certification of Non-Foreign Status, as provided for in the Foreign Investment in Real Property Tax Act, Internal Revenue Code Section 1445 and its related regulations: Sam E. Seller and Susan Seller. Any seller not named in this paragraph has not furnished a Certification of Non-Foreign Status.

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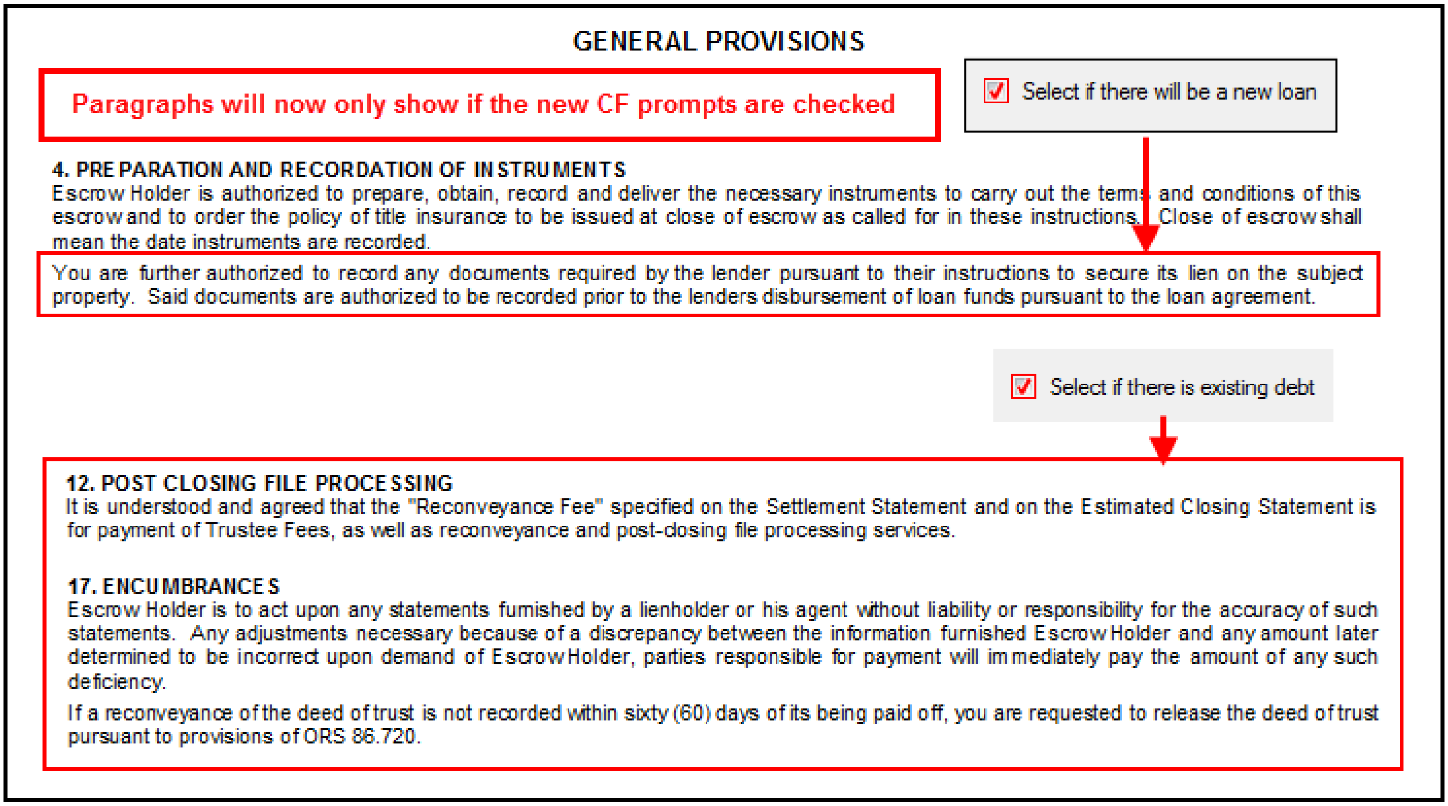
General Provisions, documents containing

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	LT Portland Commercial		521088	



GENERAL PROVISIONS

Paragraphs will now only show if the new CF prompts are checked

☑ Select if there will be a new loan

4. PREPARATION AND RECORDATION OF INSTRUMENTS
Escrow Holder is authorized to prepare, obtain, record and deliver the necessary instruments to carry out the terms and conditions of this escrow and to order the policy of title insurance to be issued at close of escrow as called for in these instructions. Close of escrow shall mean the date instruments are recorded.

You are further authorized to record any documents required by the lender pursuant to their instructions to secure its lien on the subject property. Said documents are authorized to be recorded prior to the lenders disbursement of loan funds pursuant to the loan agreement.

☑ Select if there is existing debt

12. POST CLOSING FILE PROCESSING
It is understood and agreed that the "Reconveyance Fee" specified on the Settlement Statement and on the Estimated Closing Statement is for payment of Trustee Fees, as well as reconveyance and post-closing file processing services.

17. ENCUMBRANCES
Escrow Holder is to act upon any statements furnished by a lienholder or his agent without liability or responsibility for the accuracy of such statements. Any adjustments necessary because of a discrepancy between the information furnished Escrow Holder and any amount later determined to be incorrect upon demand of Escrow Holder, parties responsible for payment will immediately pay the amount of any such deficiency.

If a reconveyance of the deed of trust is not recorded within sixty (60) days of its being paid off, you are requested to release the deed of trust pursuant to provisions of ORS 86.720.

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Information for Seller re Oregon Tax Withholding

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	OR		518631	

Adjusted spacing to keep to one page.

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Preliminary Statement Regarding Seller's Exempt Status
Preliminary Statement Regarding Seller's Exempt Status (Legal)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	Western Title		518095	

Revised the Transferor's Address to pull from the seller contact chosen for the document.

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Statement of Information
Statement of Information (Legal)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	WT Bend		517973	

Removed the line for Spouse in the PRIOR MARRIAGE(S) section.

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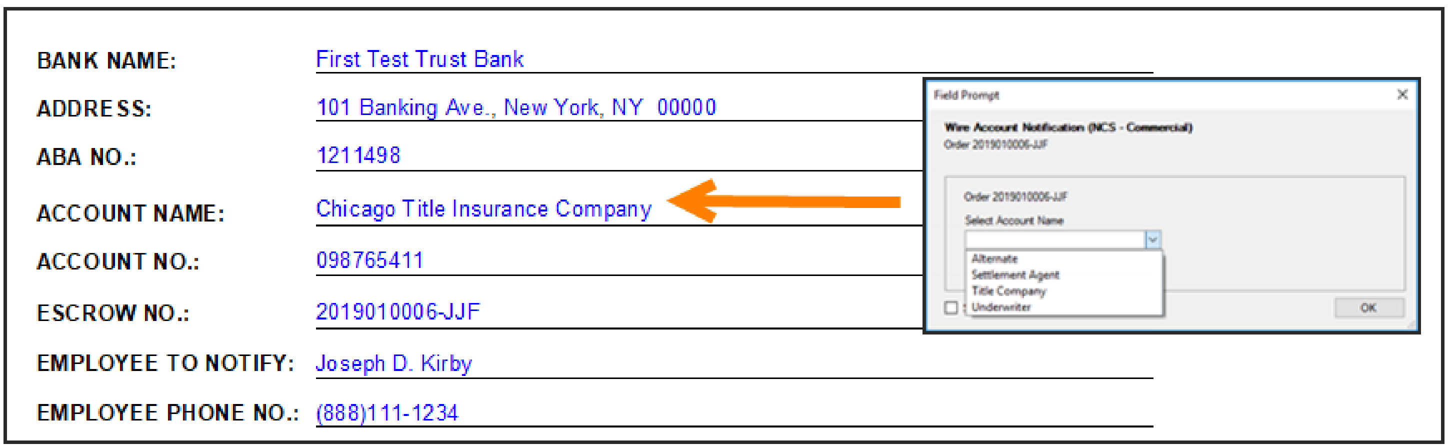
Wire Account Notification (NCS - Commercial)

New/Mod	Requested By	Incident No.	TFS No(s).	File Name (new items only)
Mod	CT Portland		519023	

<u>CT Portland profiles only:</u>

Added coding in Underwriter instance of header branding option to show Settlement Agent address, phone, and fax. Added prompt to select Account Name, including option to enter "Alternate" name.



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LOOKUP TABLES

Escrow Instruction Phrases			
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**
Mod	SoCal		517204

Revised hpp01 removing the last sentence 'Buyer and Seller elect NOT to purchase a home warranty plan.'

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TEXAS

DOCUMENTS

Escrow

Open Order Sheet (Order Summary)
Open Order Sheet (Order Summary) - Ltr
Open Order Sheet (Order Summary) with Notes
Open Order Sheet (Order Summary) with Notes - Ltr

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	TX Fee Attys		519931	

For TX Fee Attorney orders, revised to pull in the Escrow Officer and Escrow Assistant for Title Only order.


Title Officer/Examiner: Joseph D. Kirby
joe.kirby@email.com
Escrow Officer: Melissa G. Smith
melissa.smith@email.com
Processor/Assistant: Sandy L. Moore
sandy.moore@email.com
Source of Business: Listing Company Awesom
JM 2016 Cmt
SEE ORDER NOTES

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REPORTS

Dallas CPF Order Trend

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	TX		514540	

- Added two new rows in the order counts for the following and place them between Refi and Comm Resale for each branch (or county if grouped by county):
  - Acreage Sale = product type is "Acerage Sale"
  - Acreage Refi = product type is "Acerage Refi"
- Report is grouped by Brand based on custom field Order.Brand_FNF#, requesting two additional groups to show based on the following logic (these would pull from the main data set and therefore would reduce allocations to the current brand with report total staying the same) and use the same order groupings for product type, source, etc:
  - "Agent" - Order Type = Title Only AND contact selected as the Title Office (Order.Title.Office.LooupCode) has a lookup code = 'CPFLTC'
  - "Title Only" - Order Type = Title Only AND contact selected as the Title Office (Order.Title.Office.LookUpCode) has a lookup code = 'FT-IRVING'

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Order Settlement Data Export

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
NEW	TX		519300	SSCORP5390.rpt

- New report to export CDF/HUD statementdata. This replaces the "Opendoor" status in the buyer/seller statements.
- Title: Order Settlement Statement Data Export
- Parameters:
  - Order number (separate multiple with comma): Textbox to entered order number(s)
  - CDF/HUD to include: Drop down; options: All (Default), 1, 2, 3, 4, 5, 6; limit data to selected postion (same as settlement statements)
  - Charges for buyer or seller: Drop down; options: Buyer (default); Seller; limit to either buyer charges only or seller charges only
  - Export type: Drop down; options: Default (default); Opendoor; Zillow; changes export logic on certain columns
- If profile path contains "Dallas" default = Opendoor
- If profile path contains "Houston" default = Zillow
- Columns:
  - Property Address - {{Order.Properties[0].Address.FullAddress}}; 1st property
  - Date - Zillow = {{Order.SettlementDate}}; Opendoor = if order transaction type = purchase then {{Order.DisbursmentDate}} else {{Order.SettlementDate}}
  - Debit - Buyer or seller debit amount for charge
  - Credit - Buyer or seller debit amount for charge
  - Description
- Default/Opendoor - Charge section description, same as the settlement statements
- Zillow - Same as Opendoor with these changes:
  - Financial Consideration Fees show as "TOTAL CONSIDERATION"
  - Title & escrow fees = "TITLE CHARGES" are any fees for title policy, endorsement, or guaranty fee, all others will show as "ESCROW CHARGES"
  - Misc Fees show as "ADDITIONAL CHARGES"
  - Prorations/adjustments show as 'PRORATIONS AND ADJUSTMENTS"
    - Detail note - charge's description/payee name
    - Entity - 1st Seller name (default/zillow)

- Opendoor - uses the 1st buyer or 1st seller whichever is Opendoor (contains "Opendoor" or "Open door", or starts with OD); if neither the seller is used.
    - Escrow# - {{Order.Number}}
- Logic:
    - Return settlement statement charges for entered orders (HUD or CDF only)
- Note:
    - This is the same logic that is currently on the settlement statements for the Opendoor status.
    - Unlike the buyer settlement statement zero loan funding is excluded

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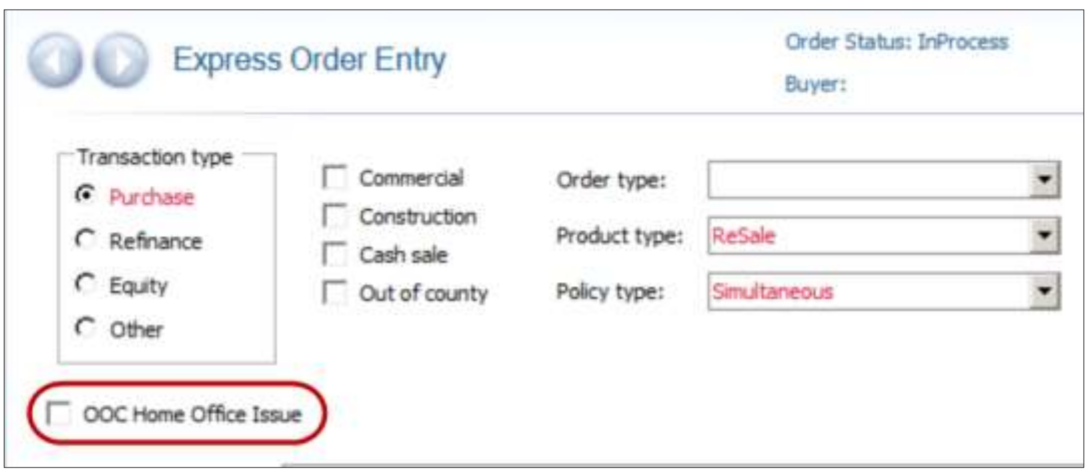
MY SCREENS

Express Order Entry				
NEW/MOD	REQUESTED BY	FOOTPRINTS NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	Lisa Simmons			

A new check box has been added for OOC Home Office Issue to the Express Order Entry screen. This field is available when using My Screens:

- Texas Commercial Screens
- Texas Commitment Revisions - Escrow
- Texas Escrow Screens
- Texas Escrow Screens-Amarillo
- Texas Escrow Screens-StarTex
- Texas Title Only – Escrow Screens
- Texas Title Screens
- TX Commercial CSS



TEXAS / NCS-TEXAS

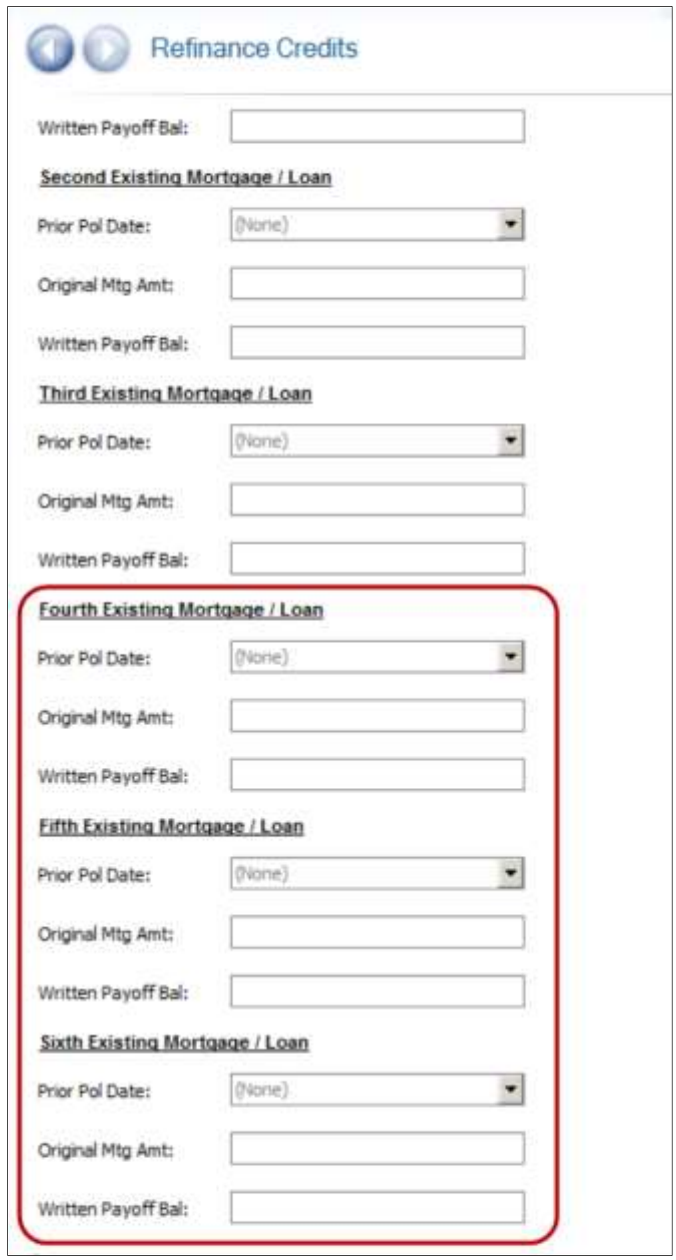
MY SCREENS

Refinance Credits Screen

NEW/MOD	REQUESTED BY	FOOTPRINTS NO(S).	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
MOD	Lisa Simmons			

Additional Existing Mortgage / Loan fields have been added to the Refinance Credits screen.

- [Fourth, Fifth, Sixth] Existing Mortgage / Loan
  - Prior Pol Date
  - Original Mtg Amt
  - Written Payoff Bal



These field are available when using My Screens:

- Texas Commercial Screens
- Texas Escrow Screens
- Texas Escrow Screens-Amarillo
- Texas Escrow Screens-StarTex
- Texas Title Only – Escrow Screens
- Texas Title Screens
- TX Commercial CSS
- TX NCS Screens

SOFTPRO SELECT

FEBRUARY RELEASE NOTES

VIRGINIA

REPORTS

Monthly Underwriting Report				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
NEW	VA		508676	SSCORP5384.rpt

General:
Title – Monthly Underwriting Report
Tree location – Title Reports

Parameters:

- ‘Commitment/Policy Status Date’ drop down
  - Issued Date
    - {{Order.Title.TitleProducts.IssueDate}} OR {{Order.Title.TitleInsuranceCalculations.LoanPolicy.IssueDate}} & {{Order.Title.TitleInsuranceCalculations.OwnersPolicy.IssueDate}}
  - Effective Date (default)
    - {{Order.Title.TitleProducts.EffectiveDate}} OR {{Order.Title.TitleInsuranceCalculations.LoanPolicy.EffectiveDate}} & {{Order.Title.TitleInsuranceCalculations.OwnersPolicy.EffectiveDate}}
  - Completed Date
    - {{ Order.Title.TitleProducts.CompletedDate}} OR {{Order.Title.TitleInsuranceCalculations.LoanPolicy.CompletedDate}} & {{Order.Title.TitleInsuranceCalculations.OwnersPolicy.CompletedDate}}
- Date from
  - default to 1st day of prior month
- Date through
  - default to last day of prior month
- Include Canceled orders Checkbox, default to unchecked
- Excel Export checked box, default to unchecked
- Branch picklist
- Title Officer picklist
- Show report programming notes
- Report comments

Groups:

- Underwriter
  - By lookup code
- Title Officer
- Commitments and Policies separately under each TO

Columns:

- Order Number
- County/City
  - Use property 1 for County and City
- Customer
  - Marketing source Contact name
  - If more than one, concatenate in same column comma separated
- COMM/RES
    - {{Order.IsCommercial}} = True, then ‘COMM’
    - {{Order.IsCommercial}} = False, then ‘RES’
- Coverage Amount
  - Sum of coverage amounts for owners and lenders policies
  - If owners coverage is NULL, pull sales price

- If lenders coverage is NULL, pull sum of loan amounts

- Total Premium
  - Sum of TP bill code
- Endorsement Fees
  - Sum of END bill code, except where fee description contains “Commitment” or “CPL”
- Amount Due to Agent/NCS
  - Sum of NBE bill code
- Commitment
  - Sum of COM bill code and END Bill code with description containing “Commitment”
- CPL
  - Sum of END bill code with description containing “CPL”
- Total Fees
  - Sum of Total Premium + Endorsement Fees + Amount Due to Agent/NCS + Commitment + CPL

Totals:

- Per group for:
  - Order count
  - Commitment count
  - Policy count
  - Coverage amount
  - Total premium
  - Endorsement fees
  - Amount due to agent/ncs
  - commitment
  - CPL
  - Total fees

Sorting:

- Alphabetically per group, then order number

Logic:

- Look for any order where the commitment and/or policy use date selected is in the date range.

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WASHINGTON

DOCUMENTS

Escrow

Closing Checklist				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
Mod	CT Bellingham		516830	

Removed lender's phone numbers and email/fax checkboxes.

DISBURSING INFORMATION:

Lender: Lender Bank & Trust ______________ Funder Name: ______________

Lender Funds Needed: $250,000.00 (1st) $25,000.00 (2nd)

Added checkboxes for:

CD Pg 1 – Changed Closing Date to Consummation Date
Final Rate Calc Verified
Refund Allowed

- ☐ Buyer/Seller Called (if no agents) __________________ (time)
- ☐ Final to Lender w/ Recording #'s
- ☐ CD Pg 1 – Changed Closing Date to Consummation Date
- ☐ SS and Seller CD
- ☐ Copy of SWD to: ________________________________
  ____
- ☐ Loan Docs removed from SV
- ☐ Final Rate Calc Verified

Report to 1099: ☐ Yes ☐ No

DISBURSING INSTRUCTIONS:

Borrower:

Refund Allowed: ☐ Yes ☐ No - See EO

____

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Questionnaire
Questionnaire Letter
Questionnaire (Buyer-Borrower)
Questionnaire (Buyer-Borrower) Letter
Questionnaire (Seller)
Questionnaire (Seller) Letter

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Tacoma		515207	

Removed the question "Who will your insurance agent be?"

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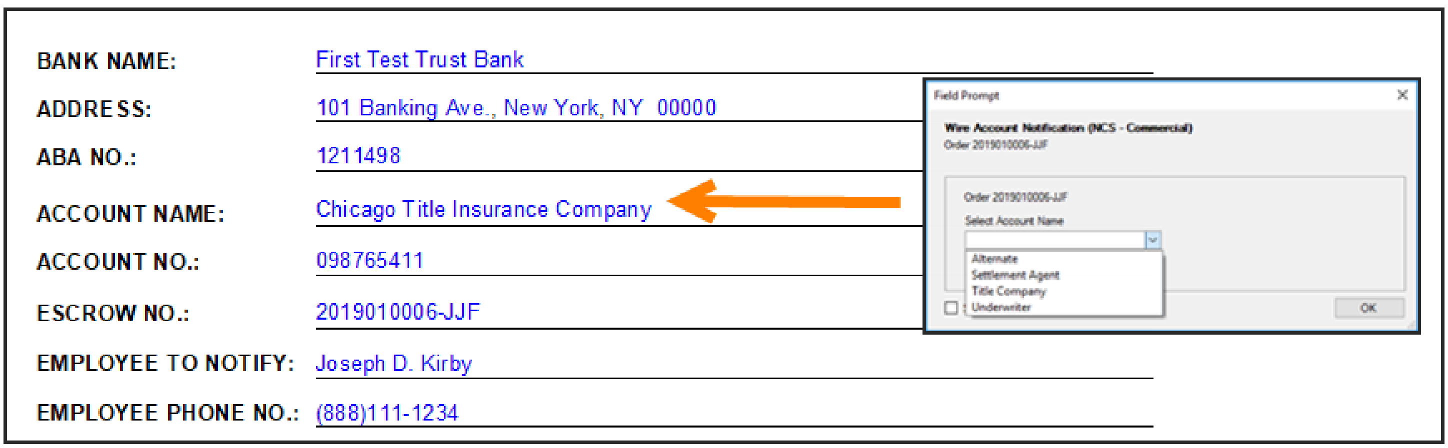
Wire Account Notification (NCS - Commercial)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	NCW\WA		519023	

NCS\WA profile only:

Added prompt to select Account Name, including option to enter "Alternate" name.



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Title

Collateral Assignment of Mortgage 2010 - CLTA 104.4-06

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	Underwriting		520539	

The CLTA 104.4-06 endorsement has been updated to reflect revised 2010 language.

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REPORTS

Exception/Requirement Codes				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
MOD	WA		515968	

- Added a new parameter called Run by with the following options
  - Orders = will run as it currently does
  - Templates = will pull all Templates regardless of dates entered
  - Restricted Templates = will pull all Restricted Templates regardless of dates entered
  - Templates and Restricted Templates = will pull all Templates and Restricted Templates regardless of dates entered
- Programming Notes: Added new drop down to parameter section with note that dates and task logic will be ignored and report will return all templates found in the profile(s).

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Order Summary by Branch/Escrow Officer				
NEW/MOD	**REQUESTED BY**	**INCIDENT NO.**	**TFS NO(S).**	**FILE NAME (NEW ITEMS ONLY)**
MOD	WA		512915	

- Updated footer note to show what bill codes are actually shown in "Other Rev" column. Currently this states any bill code with a GL code beginning 4, but not correct.
- Updated notary column to include 'NOTe' bill code (update footer to show this as well)
- Other revenue column should include bill code DOC

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WISCONSIN

DOCUMENTS

Escrow

CPL Information Request

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	CT WI		519994	

Added Settlement Agent to the document (between Order No. and Loan No.).

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Disclosure and Acknowledgment (Dane County)

NEW/MOD	REQUESTED BY	INCIDENT NO.	TFS NO(S).	FILE NAME (NEW ITEMS ONLY)
Mod	Dane County		516772	

Added custom field prompt for optional language.

☐ Any active homeowner's assocation and-or condo association dues currently collected?

9. The undersigned hereby agree to indemnify Escrow Office Name for all expenses it may incur, including reasonable attorney fees, by failure of the undersigned to comply or cooperate in the correcting of any closing documents, or the payment of additional sums which may be due pursuant to the terms of the Purchase Agreement or said closing documents.
10. Seller and Buyer acknowledge at the time of closing there is no active homeowners association and/or condo association dues currently collected. All parties agree to hold Escrow Office Name harmless.
11. The undersigned hereby declare that they have read and understand the information above, and that they have made appropriate inquiries regarding any questions they may have.

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TECHNICAL NOTES (FOR LOCAL IT/SUPPORT)

DOCUMENTS

Any new documents in this build are listed in the Title and/or Escrow User Release Notes. Due to the state-specific “All Documents” tree, these new documents are automatically available to the users upon the push to test or production.

However, those new documents may also need to be added to the operation specific tree(s) for packaging and other purposes. This is at your discretion.

Wire Fraud Checklist (Prompt)

NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
New	Add to trees	MI	SSCORPD5650.doc
Please add to Michigan\FT profiles			

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