Correspondent Loan Upload Checklist

Crescent Mortgage Company
6600 Peachtree Dunwoody Rd. NE, 600 Embassy Row, Suite 650
Atlanta, GA 30328

Bank Name: _____
Main Contact: _____
Secondary Contact:_____
Phone: _____
Email Address for All Contacts: _____
_____
_____

Please upload your package to www.crescentmortgage.com . Select the Settlement Express Option in the upper left hand corner. All original notes must be sent overnight mail to **Attn: Correspondent Department or Purchased loan Department** to the address above. Purchase status or questions can be emailed to: purchasedloans@crescentmortgage.net

Before Uploading Package – Make sure the items listed have been completed.

[ ] Wiring Instructions for your bank. Include a copy with every upload.

[ ] Hazard Policy endorsed to Crescent Mortgage Company as mortgagee. Use our Mortgagee Change Form. Complete attached. Complete and attach to insurance policy, then mail the original to the insurance company.

[ ] Flood insurance policy endorsed to Crescent Mortgage Company the same method as the Hazard insurance above. Use attached form.

[ ] MERS printout if you are assigning the loan to Crescent Mortgage Company (1002976) in the MERS system.

[ ] Tax Information and Insurance Worksheet must be completed and the due dates of taxes and amount of taxes MUST MATCH THE INITIAL ESCROW disclosure. If not, there could be a correction of escrows required. This should be completed by your closing agent.

[ ] Legible documents – Loan Applications, Application addendums and HUD-1's are the most common documents rejected because of illegibility.

[ ] Flood Cert – If your bank pulled a flood cert – assign the flood cert to Crescent Mortgage Company before uploading package for auditing.

[ ] Notaries – Seal must be legible and all dates must be completed on the notarized documents.

[ ] **DO NOT FORGET TO INPUT CONTACT INFORMATION IN THE SECTION ABOVE. Not doing this could delay your funding.**

If you have additional questions or concerns please email your AE. Files must be uploaded into Crescent's website within 5 business days of the loan funding. Items that are missing or needed after we review the loan will be given another 4 business days.

rev. 03/2015