



TRAIL Associates

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MORTGAGE NECESSARY DOCUMENTATION

The following is a list of the documentation or items that will be required for the successful completion and release of payment for Mortgage transactions.

Mortgage Information Checklist

- Copy of warranty deed
- Copy of Promissory Note
- Copy of the Mortgage or Deed of Trust
- Copy of the Title Insurance Policy
- Copy of the Hazard Insurance Policy (or evidence of hazard insurance – declaration page)
- Verification of outstanding balance
- Copy of the Closing Statement (or settlement statement)
- Proof of payment history
- Name, address and social security number of the person making payments on the note with a work and home phone number
- Copies of underlying note(s) and balance (if applicable):

** Please note that there may be additional requests if necessary to properly process and complete the transaction

Partnering for Success

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