

# Legal Work Order Form

Date: \_\_\_\_\_

TO: Attorney Kevin G. McLean

FROM: Mortgage Company: \_\_\_\_\_

Loan Officer: \_\_\_\_\_

Processor: \_\_\_\_\_

Loan Type: Cash-Out Refi / Refi / Purchase / Rate & Term

Property Address: \_\_\_\_\_

Property Type: Single-Family / Multi-Family / Condo / Investment /  
2<sup>nd</sup> House / PUD / Primary Residence

**Borrower:** \_\_\_\_\_

Borrower SS#: \_\_\_\_\_

Present Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone #'s

Home: \_\_\_\_\_

Work: \_\_\_\_\_

Cellular: \_\_\_\_\_

**Co-Borrower:** \_\_\_\_\_

Borrower SS#: \_\_\_\_\_

Present Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone #'s

Home: \_\_\_\_\_

Work: \_\_\_\_\_

Cellular: \_\_\_\_\_

## New Mortgage Information

Lender: \_\_\_\_\_

Investor \_\_\_\_\_

Loan Program: \_\_\_\_\_

Loan Amount: \_\_\_\_\_

Rate: \_\_\_\_\_

Rate Expiration Date: \_\_\_\_\_

Closing Date: \_\_\_\_\_

Title Commitment Clause:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Hazard Insurance Mortgagee Clause:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Insured Closing Protection Mortgagee Clause:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Refinance Payoff Information for Old Mortgage(s):

Mortgage Company Name: \_\_\_\_\_

Loan #: \_\_\_\_\_

Phone #: \_\_\_\_\_

Type of Mortgage: 1<sup>st</sup> / 2<sup>nd</sup> / HELOC \_\_\_\_\_

Mortgage Company Name: \_\_\_\_\_

Loan #: \_\_\_\_\_

Phone #: \_\_\_\_\_

Type of Mortgage: 1<sup>st</sup> / 2<sup>nd</sup> / HELOC \_\_\_\_\_

Mortgage Company Name: \_\_\_\_\_

Loan #: \_\_\_\_\_

Phone #: \_\_\_\_\_

Type of Mortgage: 1<sup>st</sup> / 2<sup>nd</sup> / HELOC \_\_\_\_\_

**Realtor Contact (for purchase):**

Selling Broker: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Listing Broker: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_