



## Information Required for Contract Servicing

### Basic Information [please complete]

#### Buyer

First name \_\_\_\_\_ Middle name \_\_\_\_\_ Last name \_\_\_\_\_  
Mailing address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ Zipcode \_\_\_\_\_  
Tax ID number \_\_\_\_\_

#### Seller

First name \_\_\_\_\_ Middle name \_\_\_\_\_ Last name \_\_\_\_\_  
Mailing address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ Zipcode \_\_\_\_\_  
Tax ID number \_\_\_\_\_

Mortgage Company Name \_\_\_\_\_ Loan Number \_\_\_\_\_  
Address \_\_\_\_\_ Phone Number \_\_\_\_\_

#### Property in Contract *(real estate only)*

Mailing address \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ Zipcode \_\_\_\_\_

#### *If Vehicle*

VIN Number \_\_\_\_\_ Model and Year \_\_\_\_\_

*If anything other than real estate or vehicle, please describe below*

Property description \_\_\_\_\_

### Contract Information [please provide to us]

- Note/Contract/Payment Agreement
  - full explanation of payment disbursements (parties and amounts involved)
  - description of property that is being contracted for purchase
- Amortization Schedule
  - term
  - interest rates
  - payments



### Property Information [please provide to us]

- Underlying Mortgage Information (if applicable)
  - a copy of the mortgage statement
  - loan number
  - phone number
  - overnight address
  - authorization to receive invoices
- Property Tax Information (if applicable)
  - a copy of the tax bill
  - tax bill number
  - we must receive invoices
- Insurance Information (if applicable)
  - a copy of the insurance bill
  - disbursement of funds
  - policy number
  - and we must receive the invoices
- Signed Servicing Agreement From our Website
  - borrowers and sellers names
  - physical addresses
  - contact phone numbers
  - email addresses
  - tax ID number
  - signatures from buyer and seller

### Payment Information [please provide to us; we can provide you with examples, if needed]

- ACH Information (if applicable)
  - Copy of voided check (for deposits if there are two sellers [husband and wife] they must both be on the check)
- Authorization to access account online for underlying mortgage (if applicable)
  - must provide user id and password
- Signed authorization letter (if applicable)
  - Signed Letter by the sellers with the underlying mortgage allowing us to receive statements, and communicate with the underlying mortgage if necessary)



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Loan Servicing



### Account Information [we provide to you]

- Borrowers View Central & Lender View Central
  - Notifying the buyer and seller that they can review their account online, we must have a file number in TMO before this can be setup.
- First payment letter (from SLS) explaining our
  - payment breakdown
  - fees (particularly late fees)
  - information for Bond For Deeds on how to properly provide insurance