



## NEW LENDER CHECKLIST

**Be advised, we can not accept or start servicing a loan until the following is completed and received by Covey Financial at least 15 calendar days prior to the borrower's first payment:**

### **Items from Lender**

1. [A W9 for Lender](#)
2. [Lender Info Form](#)
3. Executed Loan Servicing Agreement (provided by Covey Financial)

### **Items related to borrower**

1. Executed Loan Documents
2. Borrower Contact Info (name, email, phone, mailing address, SSN# etc.)
3. If loan requires escrow, we need statements for the required items. Examples are:
  - a. Most recent property tax statement
  - b. Most recent property insurance policy
  - c. Other statements (HOA, Termite, etc.)

These items can be sent to [Staff@coveyfin.com](mailto:Staff@coveyfin.com)

Should you have any questions, please give us a call at (210) 610-6250.