



Submitting Lender Information

Lender Name	
Lender Best Contact Ph # Or Email for questions	
Category or Project Name	
Funding Source	

Loan Information

Original Loan Balance	
Current Loan Balance	
Closing Date	
Interest Rate	
First Payment Date	
Next Payment Due Date <i>(if new loan same as First Pmt Date)</i>	
Interest Accrued From Date (last paid date, closing date, or other). Please enter a date	
Maturity Date	
Principal & Interest Payment	
Quoted Escrow Payment	
Total Loan Payment (PITI)	
Total Number of Grace Days	
Late Fee Amount	
Loan Type	<input type="checkbox"/> Interest Only <input type="checkbox"/> Principal Only <input type="checkbox"/> Principal & Interest
Maturity Type	<input type="checkbox"/> Balloon <input type="checkbox"/> Fully Amortized
Payment Frequency	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually



New Loan Setup

Email: loans@coveyfin.com

Interest Method	<input type="checkbox"/> 360 <input type="checkbox"/> 365
Interest Days Method	<input type="checkbox"/> 30-day months (360-day year) <input type="checkbox"/> Actual Days (365-day year)

Borrower Information

Borrower Name (name on documents)	
SSN or EIN # and DOB	
Mailing address	
Cell Ph # or best Ph #	
Email Address	

Co-Borrower Information

Co-borrower Name (name on documents)	
SSN or EIN # and DOB	
Mailing address	
Cell Ph # or best Ph #	
Email Address	

Subject Property Information

Property Address	
Property City, State, Zip	
Property County	
Property Tax Account Number	
Property Type (single family, commercial, land, multifamily, other)	
Appraised Value	

Escrow Information

Does this loan require escrow? If yes, please detail which items Covey Financial is to collect for(property taxes, insurance...etc)	
Initial Escrow Deposit Amount (needs to be forwarded to Covey Financial)	

Property Tax Escrow #1

Property Tax Acct Number	
Property Tax Payee Name and Address	
Property Tax Due Date(s)	
Property Tax Due Frequency	
Last known property tax amount due	

Property Tax Escrow #2

Property Tax Acct Number	
Property Tax Payee Name and Address	
Property Tax Due Date(s)	
Property Tax Due Frequency	
Last known property tax amount due	

If this loan requires additional property tax payments, please detail in special notes and provide same information.



Insurance Escrow #1

Insurance Type	<input type="checkbox"/> Hazard <input type="checkbox"/> Flood <input type="checkbox"/> Wind <input type="checkbox"/> Hail <input type="checkbox"/> Earthquake
Insurance Payee Name and Address	
Insurance Pay Frequency	<input type="checkbox"/> Monthly <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually
Insurance Next Due Date	
Insurance Expiration Date	
Insurance Premium Amount	
Insurance Policy Number	

Insurance Escrow #2

Insurance Type	<input type="checkbox"/> Hazard <input type="checkbox"/> Flood <input type="checkbox"/> Wind <input type="checkbox"/> Hail <input type="checkbox"/> Earthquake
Insurance Payee Name and Address	
Insurance Pay Frequency	<input type="checkbox"/> Monthly <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually
Insurance Next Due Date	
Insurance Expiration Date	
Insurance Premium Amount	
Insurance Policy Number	

If this loan requires additional insurance payments, please detail in special notes and provide same information.



HOA Details (if escrowed)

HOA Frequency Due	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Semi-annually <input type="checkbox"/> Annually
HOA Payee Name and Address	
HOA Installment Amount	
HOA Account or Reference Number	
HOA Next Payment Due Date	

Special Notes:

Once completed, please proceed to forward this sheet along with the following items to Covey Financial:

1. *Copies of Loan Documents*
2. *Copy of Escrow Item Statements*
 - a. *Copy of insurance policy(s)*
 - b. *Copy of recent tax statement(s)*
 - c. *Copy of HOA Statement*
3. *Upload to ShareFile or Email to: **Loans@coveyfin.com***