

Completing an eClose

Quick Guide for Loan Officers

Create an Amazing Closing Experience for Your Borrowers

eClose makes the final step of closing less-time consuming and allows your borrowers to review their documents in advance. Plus, with eSign, borrowers can sign the majority of their documents at their convenience - on the day of closing, prior to meeting with the settlement agent/notary.

Steps to eClosing success:

1. Discuss eClose with your borrowers in advance of their closing date.
2. After the closing documents have been approved, closers will email the closing package to the borrower(s), settlement agent, and in some cases, to the loan officer.
3. Once logged in, borrower(s) can view entire package and will be able to eSign the applicable documents.
4. Borrower(s) will attend their scheduled closing with settlement agent:
 - If borrower didn't eSign prior to closing they can eSign documents with the settlement agent.
 - If the borrower did eSign, the settlement agent will only need to print the wet signed documents.

You will be able to log in from the link in your email and eSign the final 1003 and addendum, if applicable. The eSigned documents will automatically be sent to the eVault and indexed.

