

Completing an eClose

Quick Guide for Closers

1 Borrower Consents to eClose

After the borrower consents to eClose, they will receive their documents electronically, allowing them to review their documents in advance of the signing. They can eSign most of their loan documents at their convenience either on the day of closing or prior to meeting with the settlement agent/notary. ConformX automatically determines the best possible combination of ink and digital closing.

2 Select Yes to eClose Option

1. Choose to deliver documents through eClose delivery method
2. Loan documents will be automatically generated and sent to borrower for review with email instructions
3. Closing documents will be sent to settlement agent
4. Go to Step #3

3 Settlement Agent Instructions

Include a note in your email to the settlement agent with the Closing Instructions and this [link](#) to the eClose Process Procedures for the Settlement Agents. The eClose Process Procedures outlines for the agent how easy it is to access the closing package, launch the eSign closing room, and verify the eSign status using Simplifile.

Sample Email to Settlement Agent:

This borrower has elected to participate in our eClose process. You will be receiving an email from Simplifile with closing instructions.

Reference this [web link](#) for easy to follow procedures.

