



Correspondent Loan Upload Checklist

Crescent Mortgage Company
6600 Peachtree Dunwoody Road, NE, 600 Embassy Row, Suite 650
Atlanta, GA 30328

Bank Name: _____

Main Contact: _____

Secondary Contact: _____

Phone: _____

Email Address for All Contacts: _____

Please upload your package to www.crescentmortgage.com . Select the Settlement Express Option in the upper left hand corner. All original notes must be sent overnight mail to **Attn: Correspondent Department or Purchased loan Department** to the address above. Purchase status or questions can be emailed to: purchasedloans@crescentmortgage.net

Before Uploading Package – Make sure the items listed have been completed.

- [] Wiring Instructions for your bank. Include a copy with every upload.
- [] Hazard Policy endorsed to Crescent Mortgage Company as mortgagee. Use our Mortgagee Change Form. Complete attached. Complete and attach to insurance policy, then mail the original to the insurance company.
- [] Flood insurance policy endorsed to Crescent Mortgage Company the same method as the Hazard insurance above. Use attached form.
- [] MERS printout if you are assigning the loan to Crescent Mortgage Company (1002976) in the MERS system.
- [] Tax Information and Insurance Worksheet must be completed and the due dates of taxes and amount of taxes **MUST MATCH THE INITIAL ESCROW** disclosure. If not, there could be a correction of escrows required. This should be completed by your closing agent.
- [] Legible documents – Loan Applications, Application addendums and HUD-1’s are the most common documents rejected because of illegibility.
- [] Flood Cert – If your bank pulled a flood cert – assign the flood cert to Crescent Mortgage Company before uploading package for auditing.
- [] Notaries – Seal must be legible and all dates must be completed on the notarized documents.
- [] **DO NOT FORGET TO INPUT CONTACT INFORMATION IN THE SECTION ABOVE. Not doing this could delay your funding.**

If you have additional questions or concerns please email your AE. Files must be uploaded into Crescent’s website within 5 business days of the loan funding. Items that are missing or needed after we review the loan will be given another 4 business days.

Rev. 10/2014