



Loan Servicing Set up Checklist

Welcome to Home Key Servicing. We are excited to have you as our client. To get your account started and to provide you with amazing service, please complete this checklist and return it with the following requested information:

- Completed Loan Setup Form: Borrower Information
- Completed W-9 for Borrower
- Completed Loan Setup Form: Seller/Lender Information
- Completed W-9 for Lender
- Underlying lien form (if applicable)
- Signed Loan Servicing Agreement
- Copy of Deed of Trust(s)
- Copy of Promissory Note(s)
- Copy of Closing Disclosure/ Settlement Statement
- Copy of Tax Certificates
- Copy of New Insurance Declaration Page
- Setup fees
- Escrow Funds (if applicable)
- Payment History (if transferred from another servicer)

Please send all documents to Home Key at NewAccounts@homekeyservicing.com. Your account will be started once all required documentation is received. Both parties will receive a confirmation Welcome Letter after setup. Please contact our Customer Service Department at (214) 810-4711 with any questions.

We look forward to servicing your account!