

This announcement is to communicate to all the applicable departments that a new PTD condition has been established in Bytepro for all South Carolina files. Condition #9000 requires that the borrower(s) fill out and execute the “Attorney/Insurance Agent Preference Form”.

Per State law, the form must be completed and executed **before closing**. As stated above, this a PTD condition and loan docs should not be drafted without completing this task.

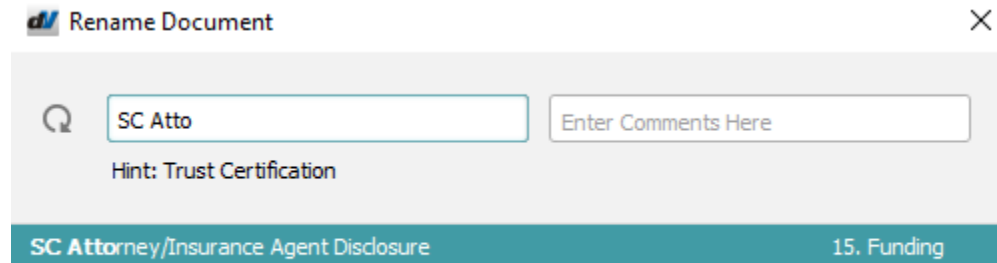
TM’s are tasked with ensuring that the borrower(s) have completed and executed the form. An instruction page should also be provided with the form. The form and instructions can be generated in Bytepro from the TM screen.

The screenshot displays the Bytepro document management interface. At the top left, there is a 'Print' button. Below it, the 'AVAILABLE DOCUMENTS' section features a 'Browse' button (selected) and a 'Search' button. A dropdown menu shows 'This Screen'. The 'SELECTED DOCUMENTS' section on the right includes icons for 'Print', 'Preview', 'Email', 'PDF', 'Store', and 'E-Sign'. Both sections contain tables of documents.

Document Name	Size	Form No
<input type="checkbox"/> CSC Approval - Wholesale an...	Legal	
<input type="checkbox"/> CSC-Suspense Notice	Legal	
<input type="checkbox"/> TM - Outstanding PTD Condi...	Legal	
<input type="checkbox"/> CSC Wholesale Loan Docume...	Legal	
<input type="checkbox"/> CSC Secure Insight Vetting Let...	Letter	
<input type="checkbox"/> Anti-Steering	Unkn...	
<input type="checkbox"/> Section 16 - Broker Package ...	Unkn...	
<input type="checkbox"/> W8 BEN (revised 07-2017)	Unkn...	
<input type="checkbox"/> Settlement Agent Fee Confirma...	Legal	
<input type="checkbox"/> TM - Outstanding PTD and PT...	Legal	
<input type="checkbox"/> CSC ODF-Plus Wholesale Loa...	Legal	
<input type="checkbox"/> CSC Pre-Declination Notice	Letter	
<input type="checkbox"/> Wholesale Condition Upload In...	Unkn...	
<input type="checkbox"/> ECOA Waiver	Unkn...	
<input type="checkbox"/> SSA-89 Form	Unkn...	
<input checked="" type="checkbox"/> SC Attorney - Insurance Agent ...	Letter	
<input checked="" type="checkbox"/> SC Attorney - Insurance Agent ...	Letter	

Note: Electronic signatures are acceptable, if the borrower has a valid e-consent on file.

Once the completed form is received, it can be saved into DV using the following name: “SC Attorney/Insurance Agent Disclosure”.



**Rename Document** ✕

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Hint: Trust Certification

SC Attorney/Insurance Agent Disclosure 15. Funding

Doc Drawers are tasked with reviewing the form and validate that it has been completed and executed.

Underwriting will be tasked with clearing the condition once everything has been satisfied.

An example of a completed form with the instructions page is included with this announcement.

*If you have any questions, please contact your manager.*