

B.O.L.T. TRAINING

Lesson 16 - Requesting A Change Of Circumstance



In This Training We Will Discuss

- Requesting A Change Of Circumstance



Requesting A Change Of Circumstance

Status and Agents

Status

Current Status: Registered Status Date: 12/19/2018 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Loan Open Registered Doc Check Funded

12/18/2018 12/19/2018

Agents

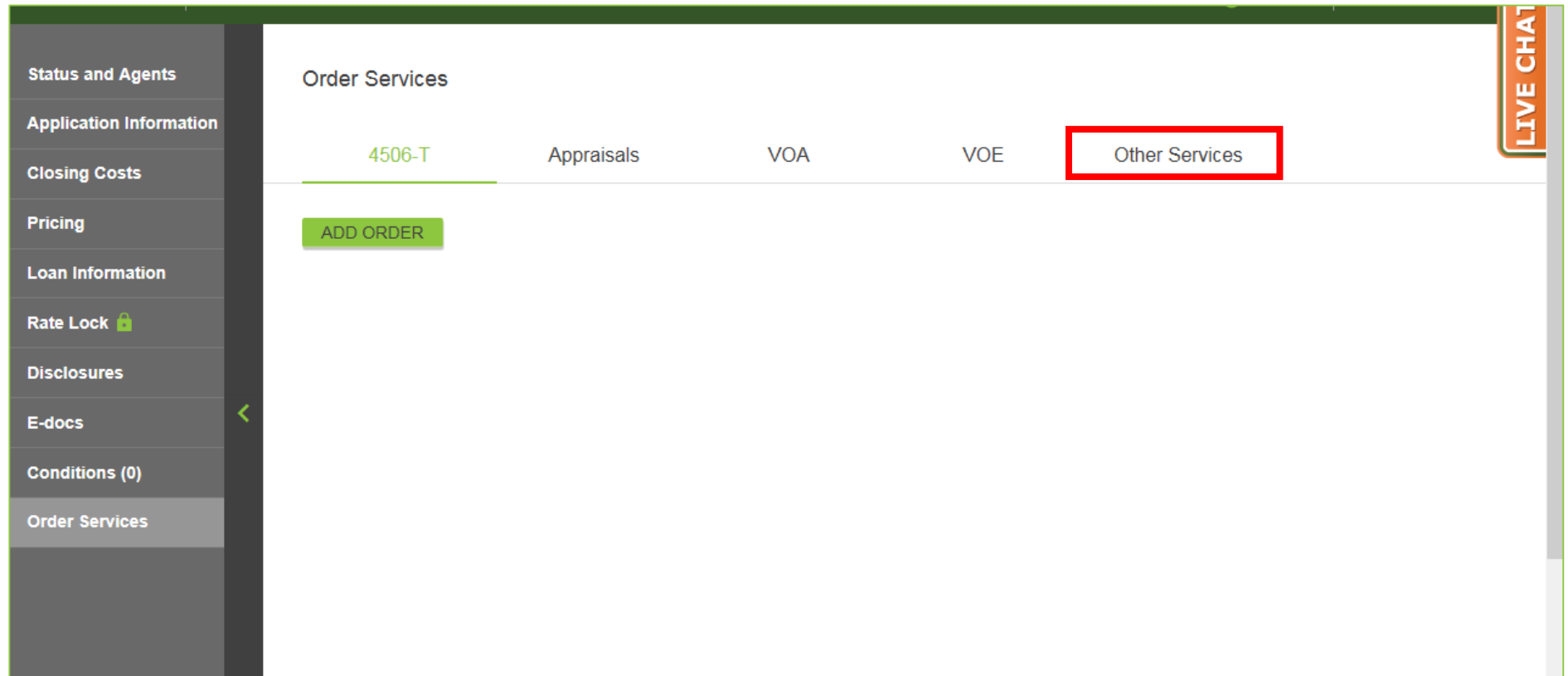
Assigned Agents in *TPO LQB Testing

Loan Officer re-assign	Processor assign
Name: Matthew Baker	Name:
Email: matthew.baker@mwfinc.com	Email:
Phone: (909) 793-1500	Phone:

Assigned Agents in Mountain West Financial, Inc.

LIVE CHAT

1. Within a loan, click “Order Services”.



2. Click “Other Services”.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (0)

Order Services

Order Services

4506-T Appraisals VOA VOE Other Services

Document Upload

COC Request

CD/DOC Request

MCC Request

VOE/VOI Request

TCF HELOC Request

Verbal Credit Authorization

Employer Lookup

LIVE CHAT

3. Click “COC Request”.

MWF Change Of Circumstance

Loan Information

Loan Number : 1000048142

Request Date : 12/21/2018 8:47:46 AM

Borrower : SUZI BUILDER

Requestor Email : matthew.baker@mwfinc.com

Property Address : 1209 Nevada


Loan Program : CF30 - CONF FIXED 30YR

Reason for Change

(Please select, and complete, the appropriate items below to complete your Change of Circumstance)

☐ Loan Amount☐ Value Change☐ Add Borrower☐ Program Change

4. The MWF Change of Circumstance will appear.



Reason for Change

(Please select, and complete, the appropriate items below to complete your Change of Circumstance)

☒ **Loan Amount**

☐ Value Change

Enter new Loan Amount :

☐ Add Borrower

☐ Program Change

☐ Delete Borrower


☐ Certification/Inspection Fee

☐ Other Reason(s)

☐ Pricing/Rate

Enter any comments to explain/clarify your COC (if needed):

5. Select all applicable Reason(s) for Change.



Reason for Change

(Please select, and complete, the appropriate items below to complete your Change of Circumstance)

☒ Loan Amount

Enter new Loan Amount :

☐ Add Borrower

☐ Delete Borrower

☐ Other Reason(s)

☐ Value Change

☐ Program Change

☐ Certification/Inspection Fee

☐ Pricing/Rate

Enter any comments to explain/clarify your COC (if needed):

6. Enter additional information for each Reason for Change.

Reason for Change

(Please select, and complete, the appropriate items below to complete your Change of Circumstance)

☒ Loan Amount

☐ Value Change

Enter new Loan Amount :

☐ Program Change

☐ Add Borrower

☐ Certification/Inspection Fee

☐ Delete Borrower

☐ Pricing/Rate

☐ Other Reason(s)

Enter any comments to explain/clarify your COC (if needed):

Enter Comments Here

7. Enter comments if needed.

(Please select, and complete, the appropriate items below to complete your Change of Circumstance)

<input checked="" type="checkbox"/> Loan Amount	<input type="checkbox"/> Value Change
Enter new Loan Amount : <input type="text" value="\$350,000"/>	
<input type="checkbox"/> Add Borrower	<input type="checkbox"/> Program Change
<input type="checkbox"/> Delete Borrower	<input type="checkbox"/> Certification/Inspection Fee
<input type="checkbox"/> Other Reason(s)	<input type="checkbox"/> Pricing/Rate

Enter any comments to explain/clarify your COC (if needed):

Submit COC Form

8. Click “Submit COC Form”.



THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>