

Initial Disclosures

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Initial Disclosures



Email Invite

You will get an email inviting you to access the signing portal for your set of initial disclosures.



The signing experience can also be done using a mobile device. Click <u>here</u> for that guide.

Please note that if you do not respond to this request within 24 hours, your document package may be printed out and mailed to you.



Logging In

Verification boxes include SSN and viewing code. The lender may add property zip code as a third option.

Complete the following information.
Lan (A) quiges of you 2004 Property 20 Code 90551 6797 Vexing Code 1370 1370
I have read 6 agree to the <u>sSign Disclosure and consent</u> in its entirely.

You must check the eSign Disclosure and Consent box to sign on.

If you get a "login error" message, close the tab and re-open this page from the link in your email.



Preparing Your Documents



The system will automatically take you to the first document that needs to be signed.



Page Features

Along the top, you will fin indicators that show progres the Review and Sign proces	id ss of sses.	f	
☆ DocMagic Sign ♥ Completed Hesse review your documents.		JOHN SMITI Customer Start sign	H ~
BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION Inderstand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return information for purposes of: (i) providing an offer: (ii) originatum, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or (iii) as othervise permitted by applicable laws, including state and federal privacy and data security laws.; or (iv) marketing The Lender includes the Lender's affiliates, agrents, service providers and any of aforementioned parties' successors and assigns. The Other Loan Participants includes any actual or potential owners of a loan resulting from your loan application, or acquirers of may beneficial or other interest in the loan, any invergage insurer, guarantor, any servicers or service providers of these parties and any of aforementioned partice assigns.	•	Borrower's Certification, Authorization and Addendum to Loan Application California Domestic Partnership Addendu Uniform Residential Loan Application IVES Request for Transcript of Tax Return Authorization for the Social Security Adml California Acknowledgment of Receipt of L California Copies of Signed Documents California Fair Lending Notice	2 3 ()
Signature Borrower JOHN SMITH Date Borrower Date	(0)	California Hazard Insurance Disclosure Housing Counselors Near You Important Information About Procedures f Iowa Subordination Agreement Lender Record Change Loan Estimate	

All documents are listed in this column on the right.



Page Features

"Start signing" begins the signing process.

Please review your documents.	B	Initia	al Disclosure	onsent	Start sign	ning
	5		n, Autorization and et	hisent		
				a	Borrower's Certification, Authorization and	E
BORROWER CONS	ENT TO THE U	JSE OF TAX RETURN	INFORMATION		Addendum to Loan Application	
I understand, acknowledge, and agree	that the Lender and	Other Loan Participants can	obtain, use and share tax retur	n	California Domestic Partnership Addendu	00
information for purposes of:					Uniform Residential Loan Application	G
 providing an offer; originating, maintaining, as otherwise permitted by 	managing, monitori	ng, servicing, selling, insur cluding state and federal pri	ing, and securitizing a loan; o	ar or	IVES Request for Transcript of Tax Return	
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The Lender includes the Lender's aff and assigns.	iliates, agents, servi	ice providers and any of afo	rementioned parties' successor	-8	California Acknowledgment of Receipt of L	
The Other Loan Participants includes	any actual or poten	tial owners of a loan resulti	ng from your loan application	l.	California Copies of Signed Documents	
providers for these parties and any of	aforementioned p	arties' successors and assign	rantor, any servicers or servic is.	c	California Fair Lending Notice	
					California Hazard Insurance Disclosure	
Signature					Housing Counselors Near You	
Borrower JOHN SMITH	Date	Borrower	Dat	e	Important Information About Procedures f	
↓					Iowa Subordination Agreement	
					Lender Record Change	
					Loan Estimate	

You can't sign anything until you hit the purple button in the top right corner – until then, this will remain greyed out and you won't be able to sign.



Page Features





Page Features

Your information can be viewed and edited here (click on your name).

-		0.3 (My Documents
e review your documents.	Borrower's Certific	Initial Disclosure ation, Authorization and Cons	ent	Change Email Address
			a Î	Borrower's Certification Withdraw Consent
BORROWER CONSE	INT TO THE USE OF TAX RET	URN INFORMATION		Addendum to Loan App Terms of Use
I understand, acknowledge, and agree th	hat the Lender and Other Loan Participar	ts can obtain, use and share tax return		California Domestic Par
information for purposes of:				Uniform Residential Loa
 (i) providing an offer; (ii) originating, maintaining, m (iii) as otherwise permitted by a 	anaging, monitoring, servicing, selling,	insuring, and securitizing a loan; or		IVES Request for Transcript of Tax Return
(iv) marketing	pricable laws, including state and react	ai privacy and data security iaws., of		Authorization for the Social Security Admi
The Lender includes the Lender's affili and assigns.	ates, agents, service providers and any o	of aforementioned parties' successors		California Acknowledgment of Receipt of L
The Other Loan Participants includes a	ny actual or potential owners of a loan	esulting from your loan application,		California Copies of Signed Documents
or acquirers of any beneficial or other i providers for these parties and any of a	nterest in the loan, any mortgage insure forementioned parties' successors and	r, guarantor, any servicers or service assigns.		California Fair Lending Notice
				California Hazard Insurance Disclosure
Signature	1			Housing Counselors Near You
Borrower JOHN SMITH	Date Borrower	Date		Important Information About Procedures f
				Iowa Subordination Agreement
				Lender Record Change
				Loan Estimate



Page Features

Please review your documents. Bo	Initial Disclosure rrower's Certification, Authorization and Cons	sent		Start	signing
DEREGUEEE CONSERT CO T C D C D Inderstand, acknowledge, and agree that the Lender and C 0. 0.	SE OF TAX RETURN INFORMATION Deter Loan Participants can obtain, use and share tax return g, servicing, selling, insuring, and securitizing a loan; or uding state and federal privacy and data security laws.; or e providers and any of aforementioned parties' successors al owners of a loan resulting from your loan application, ary mortgage insurer, guarantor, any servicers or service ties' successors and assigns.	e	•	Initial Disclosure Version 2 · ID: 1151632 Loan Number 777032120240001 Package Details 17 documents • 66 total pages 17 documents • 66 total pages Date sent March 21, 2024 Expiration Date March 21, 2024 Sent by Steve Truitt struitt@docmagic.com DSI TEST LENDER (SALES)	22
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Click the information icon to see document package metadata.



Page Features

🛠 DocMagic	🛈 Review 🔵 Sign 🥐	Completed	JS JOHN Custor	SMITH ner
Please review your documents.	Initial Disclosure Borrower's Certification, Authorizat	ion and Consent	Sta	art signing
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		п		

Click here to view participants.



Page Features

This button brings you back to the list of Documents (selected by default).

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BORROWER CONS	ENT TO THE USE OF TAX R	ETURN INFORM	ATION	9	Addendum to Loan Application	
I understand, acknowledge, and agree	that the Lender and Other Loan Partici	pants can obtain, us	e and share tax return		California Domestic Partnership Addendu	
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 providing an offer; originating, maintaining, r as otherwise permitted by 	nanaging, monitoring, servicing, selli	ing, insuring, and s	ecuritizing a loan; or		IVES Request for Transcript of Tax Return	
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					California Hazard Insurance Disclosure	
Signature					Housing Counselors Near You	
Borrower JOHN SMITH	Date Borrower		Date		Important Information About Procedures f	
					Iowa Subordination Agreement	
					Lender Record Change	
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Click Signing

There are three options for click-signing.

1. Clicking the pen icon JOHN SMITH Customer DocMagic 🕗 Review 💿 Sign 🌾 Completed Signatures to go 15 Borrower's Certification, Authorization and Consent BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION Borrower's Certification, Authorization ... understand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return formation for purposes of: Addendum to Loan Application 0) providing an offer; originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or as otherwise permitted by applicable laws, including state and federal privacy and data security laws; or marketing California Domestic Partn Uniform Residential Loan Application (IVES Request for Transcript of Tax Ret The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors ion for the Social Security Ad... The Other Loan Participants includes any actual or potential owners of a loan resulting from your loan application, or acquirers of any beneficial or other interest in the loan, any mortgage insurer, guarantor, any servicers or service providers for these parties and any of a dorementioned parties' successors and assigns. nia Acknowledgment of Receipt ... lifornia Copies of Signed Documents California Fair Lending Notice Sign California Hazard Insurance Disclosure Date Borrower Date ng Counselors Near You Important Information About Procedur... Iowa Subordination Agreement Lender Record Change 53 Loan Estimate Settlement Services Pre 3. Clicking on the 2. Clicking Green Sign box will on the "Sign" automatically box directly. advance to the next task each time.



Signature Options

Cancel

You have the option to choose the preformed signatures available in this tab. A DocMagic JOHN SMITH Customer 🞯 Review 💿 Sign 🤎 Completed 15 Se ect Your Signature × Choose Draw Upload 0 O John Smith JS John Smith JS 0 John Smith JS O John Smith JS By checking this box, I ratify the use of the image I have selected



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Signature Options

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DSI	TEST LENDER (SALES)		(800) 6	49-1362				
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You might be required to click a check box before signing certain documents. In these circumstances, you cannot proceed unless the box is checked.



Keeping Track of Progress

The countdown feature shows how many signatures remain.





When Complete



All applicable checkmarks will be green.



When Complete

After you click Done on the previous screen, you may download the completed set of documents.



