

JOB AID: Requesting Closing Disclosures

Practical guidance for CWL brokers & partners

Community Wholesale Lending

Version: 1.0 Date: 09/08/2025

Community Wholesale Lending parcsupport@cwlend.com | www.cwlend.com

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1. Overview

This job aid provides step-by-step guidance on requesting a closing disclosure

2. Step-by-Step Instructions

- 1. Navigate to the Loan snapshot screen
- Select the requests option

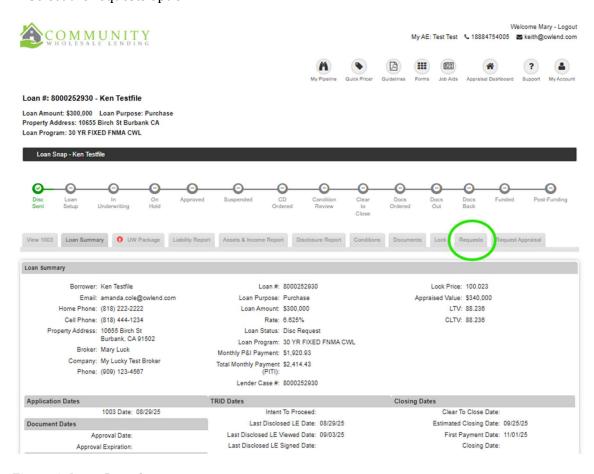


Figure 1. Loan Snapshot

2. Closing Disclosure

- Select Request Closing Disclosure

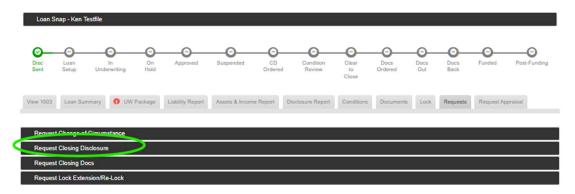


Figure 2. Requests

- 2. Request Closing Disclosures
- Complete all fields with a red asterisk (*)
- Add comments for your closer
- Upload all applicable invoices

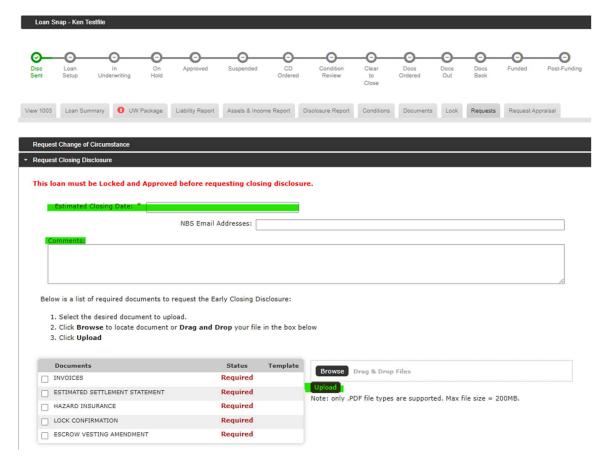


Figure 3. Request Closing Disclosure

3. Quick Tips / Common Errors to Avoid

- ✓ Notify your closer if any fees need to be reimbursed
- ✓ Include a **current** settlement statement
- ✓ Include the insurance RCE (if applicable)
- ✓ Upload all invoices (as applicable)
- ✓ Include your Non borrowing spouses' email address (if applicable)
- ✓ The loan file is required to be locked and approved prior to ordering the CD

4. Support

Need help? Contact parcsupport@cwlend.com