



# JOB AID: Requesting Closing Disclosures

Practical guidance for CWL brokers & partners

**Community Wholesale Lending**

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Version: 1.0   Date: 09/08/2025

Community Wholesale Lending  
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# JOB AID: Requesting Closing Disclosures

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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

**COMMUNITY WHOLESALE LENDING**

Welcome Mary - Logout  
My AE: Test Test    18884754005    keith@cwleand.com

My Pipeline   Quick Pricer   Guidelines   Forms   Job Aids   Appraisal Dashboard   Support   My Account

**Loan #: 8000252930 - Ken Testfile**  
Loan Amount: \$300,000    Loan Purpose: Purchase  
Property Address: 10655 Birch St Burbank CA  
Loan Program: 30 YR FIXED FNMA CWL

**Loan Snap - Ken Testfile**

Disc Sent   Loan Setup   In Underwriting   On Hold   Approved   Suspended   CD Ordered   Condition Review   Clear to Close   Docs Ordered   Docs Out   Docs Back   Funded   Post-Funding

View 1003   Loan Summary   UW Package   Liability Report   Assets & Income Report   Disclosure Report   Conditions   Documents   Lock   **Requests**   Request Appraisal

**Loan Summary**

Borrower: Ken Testfile	Loan #: 8000252930	Lock Price: 100.023
Email: amanda.cole@cwleand.com	Loan Purpose: Purchase	Appraised Value: \$340,000
Home Phone: (818) 222-2222	Loan Amount: \$300,000	LTV: 88.236
Cell Phone: (818) 444-1234	Rate: 6.625%	CLTV: 88.236
Property Address: 10655 Birch St Burbank, CA 91502	Loan Status: Disc Request	
Broker: Mary Luck	Loan Program: 30 YR FIXED FNMA CWL	
Company: My Lucky Test Broker	Monthly P&I Payment: \$1,920.93	
Phone: (909) 123-4567	Total Monthly Payment \$2,414.43 (PITI):	
	Lender Case #: 8000252930	

Application Dates	TRID Dates	Closing Dates
1003 Date: 08/29/25	Intent To Proceed:	Clear To Close Date:
<b>Document Dates</b>	Last Disclosed LE Date: 08/29/25	Estimated Closing Date: 09/25/25
Approval Date:	Last Disclosed LE Viewed Date: 09/03/25	First Payment Date: 11/01/25
Approval Expiration:	Last Disclosed LE Signed Date:	Closing Date:

Figure 1. Loan Snapshot

## 2. Closing Disclosure

- Select Request Closing Disclosure

Loan Snap - Ken Testfile

Disc Sent (checked) | Loan Setup | In Underwriting | On Hold | Approved | Suspended | CD Ordered | Condition Review | Clear to Close | Docs Ordered | Docs Out | Docs Back | Funded | Post-Funding

View 1003 | Loan Summary | **UW Package** | Liability Report | Assets & Income Report | Disclosure Report | Conditions | Documents | Lock | **Requests** | Request Appraisal

**Request Change of Circumstance**  
**Request Closing Disclosure**  
Request Closing Docs  
Request Lock Extension/Re-Lock

Figure 2. Requests

## 2. Request Closing Disclosures

- Complete all fields with a red asterisk (\*)
- Add comments for your closer
- Upload all applicable invoices

Loan Snap - Ken Testfile

Disc Sent (checked) | Loan Setup | In Underwriting | On Hold | Approved | Suspended | CD Ordered | Condition Review | Clear to Close | Docs Ordered | Docs Out | Docs Back | Funded | Post-Funding

View 1003 | Loan Summary | **UW Package** | Liability Report | Assets & Income Report | Disclosure Report | Conditions | Documents | Lock | **Requests** | Request Appraisal

**Request Change of Circumstance**  
**Request Closing Disclosure**

**This loan must be Locked and Approved before requesting closing disclosure.**

Estimated Closing Date: \*

NBS Email Addresses:

Comments:

Below is a list of required documents to request the Early Closing Disclosure:

1. Select the desired document to upload.
2. Click **Browse** to locate document or **Drag and Drop** your file in the box below
3. Click **Upload**

Documents	Status	Template
<input type="checkbox"/> INVOICES	Required	
<input type="checkbox"/> ESTIMATED SETTLEMENT STATEMENT	Required	
<input type="checkbox"/> HAZARD INSURANCE	Required	
<input type="checkbox"/> LOCK CONFIRMATION	Required	
<input type="checkbox"/> ESCROW VESTING AMENDMENT	Required	

**Browse** Drag & Drop Files

**Upload**

Note: only .PDF file types are supported. Max file size = 200MB.

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](mailto:parcsupport@cwlend.com)