

JOB AID: Requesting Loan Docs

Practical guidance for CWL brokers & partners

Community Wholesale Lending

Version: 1.0 Date: 08/29/2025

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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

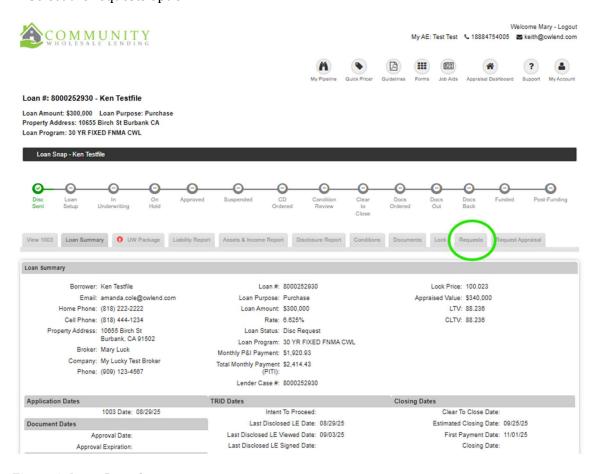


Figure 1. Loan Snapshot

2. Closing Docs

- Select Request Closing Docs

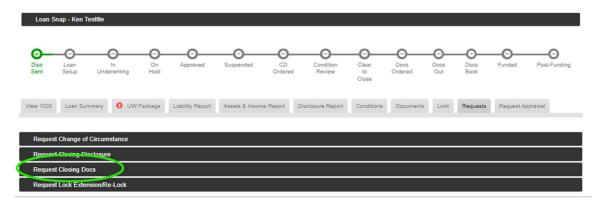


Figure 2. Requests

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

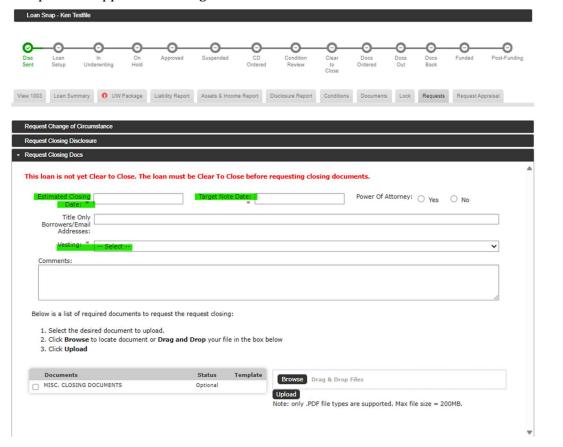


Figure 3. Request Closing Docs

3. Quick Tips / Common Errors to Avoid

- ✓ Complete any comments for your closer
- ✓ The loan file must be clear to close before docs can be ordered

4. Support

Need help? Contact parcsupport@cwlend.com