



Closing Package Checklist

BORROWER(S) NAME: _____ WHEDA LOAN #: _____

CONTACT PERSON: _____ PHONE #: _____

LENDER NAME: _____

EMAIL ADDRESS: _____

Assemble the closing package in the following order and submit within 10 calendar days of closing.

- _____ 1. **Closing Package Checklist** (Form 12)
- _____ 2. **Funding Request – Correspondent Channel** only (Form 7)
- _____ 3. Screen print of **FHA Connection** (Correspondent Channel only)
 - Application Submission Complete
 - Servicing Transfer
- _____ 4. Confirmation of **UpFront Mortgage Insurance Premium payment** (Correspondent Channel only)
- _____ 5. Original **Note** (acceptable to FHA)
 - Properly endorsed “Pay to the order of Wisconsin Housing and Economic Development Authority without recourse” (Correspondent Channel only)
 - Insert officer name and title, Lending Institution and signature and NMLS ID information
 - Include all Riders
 - Original executed **Name Affidavit** for each borrower, if applicable
- _____ 6. Original **recorded Mortgage** (Acceptable to FHA)
 - Plus all **recorded** Addenda and FHA Riders.
 - Plus NMLS ID information
- _____ 7. Original **recorded Assignment of Mortgage** (Correspondent Channel only)
- _____ 8. **Closing Disclosure – all versions** for the borrower and seller
 - Plus Settlement Certification
 - Plus copy of amortization schedule
- _____ 9. Evidence of **down payment assistance** (other than Easy Close). Provide copies of Note, Mortgage and Retention Agreement
- _____ 10. Final signed **Loan Application Form 1003**
- _____ 11. Final signed **92900A Loan Application Addendum**
- _____ 12. Long or Short Form **Mortgagee's Final Title Insurance Policy**
- _____ 13. Survey or Plat Map, if applicable
- _____ 14. **Certificate of Hazard Insurance, Flood Insurance (if applicable) & paid receipt of 1st year's annual premium or payment reflected on Closing Disclosure:**
 - Mortgagee clause should read WHEDA, its successors and/or assigns, PO Box 1728, Madison, WI 53701
 - Provide Condominium Certificate of Insurance and Condominium Insurance Warranty (Form 14), if applicable
 - Notify insurance agent of the WHEDA loan # and that there is an escrow account
- _____ 15. **W-9 Form** provide a separate signed form for each borrower

If Items 6, 7, 24 and 25 are not available, submit certified copies.



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- _____ 16. **IRS Form 4506-T** for each borrower
- _____ 17. **Notice to Homeowner** Assumption of HUD/FHA
- _____ 18. **Final Loan Estimate**
- _____ 19. Verification of borrower(s) **Receipt of a copy of Appraisal**
- _____ 20. **Initial Escrow Account Disclosure Statement**
- _____ 21. **Life of Loan Flood Determination Certificate** and evidence of transfer to WHEDA
- _____ 22. **Hotel and Transient Use of Property** (2 unit properties only)

If Borrower is participating in the Easy Close Loan Program, please submit the following:

- _____ 23. Original **Mortgage Note** (list WHEDA as the Lender)
- _____ 24. Original **recorded Mortgage** (list WHEDA as the Lender) with FHA Easy Close Mortgage Rider attached
- _____ 25. Certified copy of the **Assignment of Mortgage** (Correspondent and Mini-Corr Channel Only)
- _____ 26. **Final Loan Estimate**
- _____ 27. **Closing Disclosure** – initial and final signed by the borrower

Send to:
WHEDA
Attention: Secondary Marketing
PO BOX 1728, MADISON WI 53701-1728
Or
201 W. WASHINGTON AVE, SUITE 700, MADISON WI 53703