



# Home Improvement Advantage Closing Package Checklist

Borrower Name: \_\_\_\_\_ Loan # \_\_\_\_\_

Lender Name \_\_\_\_\_

Contact Person \_\_\_\_\_ Phone # \_\_\_\_\_

Email Address \_\_\_\_\_

*Assemble the closing package in the following order:*

- \_\_\_\_\_ 1. Closing Package Checklist (Home Improvement Form 4)
- \_\_\_\_\_ 2. Original Note endorsed to "Pay to the order of Wisconsin Housing and Economic Development Authority without recourse"
- \_\_\_\_\_ 3. Original recorded Mortgage
- \_\_\_\_\_ 4. Original recorded Assignment of Mortgage
- \_\_\_\_\_ 5. Life of Loan Flood Determination Certificate and evidence of transfer to WHEDA
- \_\_\_\_\_ 6. W-9 Form for each borrower
- \_\_\_\_\_ 7. Copies of check(s) made payable to the borrower and contractor or the borrower and supplier
- \_\_\_\_\_ 8. Closing Disclosure
- \_\_\_\_\_ 9. Loan Estimate and all redisclosures
- \_\_\_\_\_ 10. Completion Certificate, if applicable.
  - Appraiser to complete the Certificate within 180 days of the Note date
- \_\_\_\_\_ 11. Certificate of Hazard Insurance and Flood Insurance, if applicable:
  - Mortgagee clause should read:  
WHEDA, its successors and/or assigns  
PO Box 1728, Madison, WI 53701
  - Notify insurance agent of the WHEDA loan number
- \_\_\_\_\_ 12. Copy of Right to Rescind

If items 3 and 4 are not available, submit certified copies

**Forward the original recorded Mortgage and Assignment of Mortgage to WHEDA when available.**

Send to:  
**WHEDA**  
 Secondary Marketing Department  
 PO BOX 2209, MADISON WI 53701-2209  
 Or  
 201 W. WASHINGTON AVE, SUITE 700, MADISON WI 53703