



## Borrower Information Sheet for Refinance

Property Address: \_\_\_\_\_

Borrower(s) Legal Name: \_\_\_\_\_ & \_\_\_\_\_

Borrower(s) Social Security Number (REQUIRED): \_\_\_\_\_ & \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Home/Work/Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

*If Closing in the name of a Corporation, Trust, LLC or other entity, please provide the following information: a copy of the By-Laws for a Corporation, a copy of the Trust Agreement for a Trust or a copy of the Operating Agreement for an LLC as it will be required.*

Name of Entity: \_\_\_\_\_

EIN Number of Entity: \_\_\_\_\_

Mailing Address of Entity: \_\_\_\_\_

Individual(s) Signing for Entity & in what Capacity: \_\_\_\_\_

**Will Borrower(s) be Present at Closing?**  Yes  No

**If Selected "Yes"**

At which location would you prefer to close?  Blue Ridge  Ellijay

Please select the closing time that is most convenient for you. The closing time will be confirmed based on availability.

10:00 AM  11:00 AM  12:00 PM  1:00 PM  2:00 PM  3:00 PM

**If Selected "No"**

Will a Power of Attorney be needed?  Yes  No

Which Borrower(s) will need the Power of Attorney? \_\_\_\_\_ Who will sign on their behalf? \_\_\_\_\_

*If you are unable to attend the closing, please contact your pre-closer for options that may be available. Attendance by all parties, if possible, is highly recommended at this time as the options noted above may delay the funding of the transaction and lead to additional coordination fees.*

**Mortgage Information-Print Clearly and Fill Out Completely**

**1<sup>st</sup>**

**2<sup>nd</sup>**

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

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

Lender Phone: \_\_\_\_\_

Lender Phone: \_\_\_\_\_

Loan Number: \_\_\_\_\_

Loan Number: \_\_\_\_\_

Is this an equity Line? Yes  No

Is this an equity Line? Yes  No

*This authorizes Wilson Hamilton, LLC to obtain any information on the above referenced mortgage. I further acknowledge and agree that applicable fees may be assessed to my account as a result of this request. Fees may be charged per item, per request and are subject to change and this authorization does not expire until revoked by me.*

**Signature:**

\_\_\_\_\_

Do you wish to receive your proceeds by:      [ ] Check    [ ] Wire Transfer

*If selected “Wire Transfer” you will receive an email and/or text from CertifID stating that Wilson Hamilton Real Estate Law wants to securely collect your bank account information using CertifID. This will ensure a safe transfer of funds to you after the closing. CertifID helps reduce the risk of wire fraud by verifying your identity and securely sharing bank information. You can either click on the “Submit Account Information” button embedded in the email or follow the secure text link sent to your mobile device.*

*Proceeds must be payable to the persons or entities showing of record on title, there are no exceptions.*

**Wire Fraud Disclosure**

*As a seller, you will likely receive net proceeds after the sale. Wilson Hamilton Real Estate Law will securely collect or confirm your account information through CertifID. If you have any questions about this process, call or email our office.*

**WARNING:**

- *If you receive a request to wire funds through ANY way other than CertifID, STOP. Call us immediately from an independently verified phone number.*
- *Don’t trust a phone number or email address provided in any email that asks you for money.*
- *Never wire money without double-checking that the wiring instructions are correct.*

Have you received and read the stated Wire Fraud Disclosure listed above?      [ ] Yes [ ] No

**Signature:**

\_\_\_\_\_