

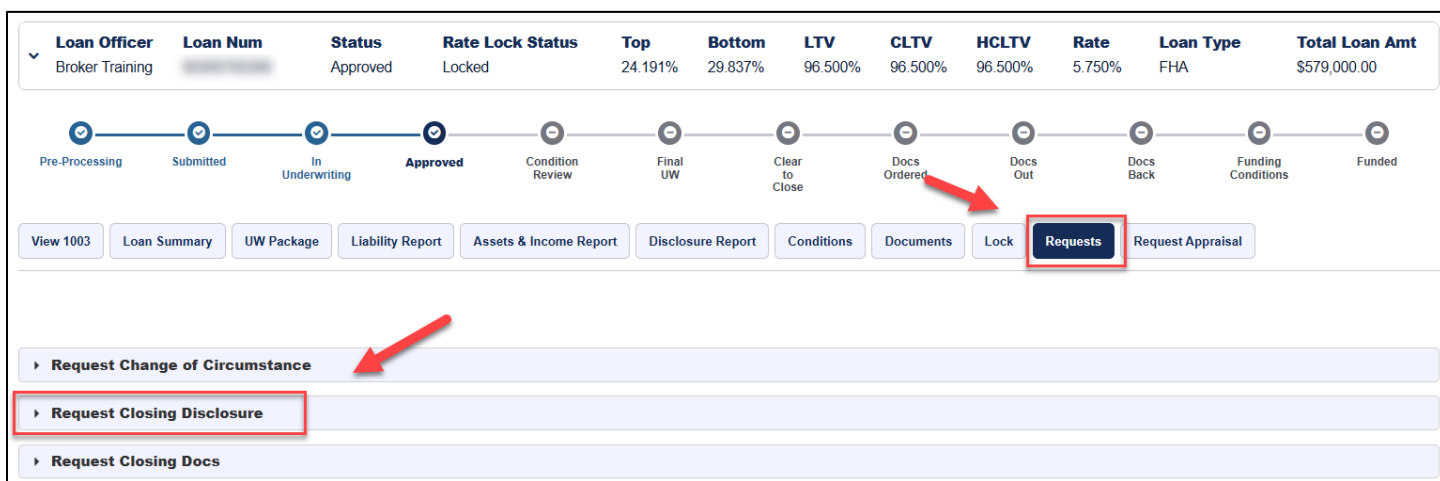
Bolt – How to Request a CD

Prerequisites

CD requests are only available on loans in Approved status or later with an active rate lock.

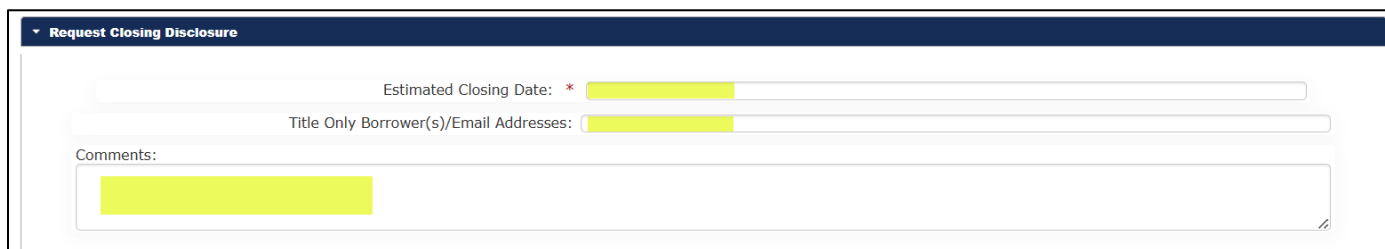
Procedure

To request a Closing Disclosure (CD), go to **Requests > Request Closing Disclosure**:



The screenshot shows the Bolt loan management interface. At the top, there is a table with loan details: Loan Officer (Broker Training), Loan Num (redacted), Status (Approved), Rate Lock Status (Locked), Top (24.191%), Bottom (29.837%), LTV (96.500%), CLTV (96.500%), HCLTV (96.500%), Rate (5.750%), Loan Type (FHA), and Total Loan Amt (\$579,000.00). Below the table is a progress bar with 13 steps: Pre-Processing, Submitted, In Underwriting, Approved, Condition Review, Final UW, Clear to Close, Docs Ordered, Docs Out, Docs Back, Funding Conditions, and Funded. The 'Approved' step is highlighted. Below the progress bar is a row of tabs: View 1003, Loan Summary, UW Package, Liability Report, Assets & Income Report, Disclosure Report, Conditions, Documents, Lock, Requests, and Request Appraisal. The 'Requests' tab is highlighted with a red box. Below the tabs is a list of request types: Request Change of Circumstance, Request Closing Disclosure, and Request Closing Docs. The 'Request Closing Disclosure' option is highlighted with a red box and a red arrow points to it.

Complete the CD request fields:



The screenshot shows the 'Request Closing Disclosure' form. It has a dark blue header with the text 'Request Closing Disclosure'. Below the header are three input fields: 'Estimated Closing Date: *' with a yellow highlight, 'Title Only Borrower(s)/Email Addresses:' with a yellow highlight, and 'Comments:' with a yellow highlight.

Upload documents with the CD request. Some documents are required while others are optional:

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

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

1. Select document

Documents	Status	Template
☒ Settlement Statement	Required	
☐ Preliminary Title Report	Optional	
☐ Purchase Contract	Optional	
☐ Hazard Insurance Declaration Page	Optional	
☐ Invoice (Appraisal, Credit, VOE, 3rd Party Processing, etc.)	Required	

2. Drag/drop or select file

Browse Drag & Drop Files

1). Settlement Statement.pdf

Cancel

Upload

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

3. Upload

Once all required documents have been uploaded, hit “Request CD”:

Documents	Status	Template
☐ Settlement Statement	✓	
☐ Preliminary Title Report	Optional	
☐ Purchase Contract	Optional	
☐ Hazard Insurance Declaration Page	Optional	
☐ Invoice (Appraisal, Credit, VOE, 3rd Party Processing, etc.)	✓	

Request CD

Browse Drag & Drop Files

Upload

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

Uploaded Documents	Document Type
Settlement Statement Invoice (Appraisal, Credit, VOE, 3rd Party Processing, etc.)	

Questions?

Please contact your Account Manager with any questions about CD requests.