

Closing Disclosure Contact Information

The contact information that pulls over to the Closing Disclosure comes from the Rolodex entry selection in the file.

Contact Information	Lender	Mortgage Broker	Real Estate Broker (B)	Real Estate Broker (S)	Settlement Agent
Name					
Address	1	3	5	7	9
NMLS ID					
MA License ID					
Contact					
Contact NMLS ID					
Contact MA License ID	2	4	6	8	10
Email					
Phone					

The top portion (in red, items 1, 3, 5, 7, and 9) are based off the **COMPANY**'s Name, Address, NMLS ID, (state) License ID entered in the Rolodex.

The bottom portion (in orange, items 2, 4, 6, 8, and 10) are based off the **CONTACT**'s Name, NMLS ID, Contact (state) License ID, Email, and Phone entered in the Rolodex under said **Company**.

So, for example, if you have a phone number entered in the **Company** section of the Rolodex, but not under the **Contact** section, then a phone number will not pull.

Below describes where from the Rolodex the Contact Information pulls from:

- Lender** in **COMPANY** section
To select in file: **Maintain File > Lender Information > Lender**
- Lender > Loan Originator** in **CONTACT** section
To select in file: **Maintain File > Lender Information > Lender CD Contact**
- Mortgage Broker** in **COMPANY** section
To select in file: **Maintain File > Lender Information > Broker**
- Mortgage Broker > Loan Originator or Loan Processor** in **CONTACT** section
To select in file: **Maintain File > Lender Information > Broker CD Contact**
- Real Estate Broker** in **COMPANY** section
To select in file: **Maintain File > Financial Information > Selling Broker Name**
- Real Estate Broker > Real Estate Agent** in **CONTACT** section
To select in file: **Maintain File > Financial Information > Agent (under Selling Broker Name)**
- Real Estate Broker** in **COMPANY** section
To select in file: **Maintain File > Financial Information > Listing Broker Name**
- Real Estate Broker > Real Estate Agent** in **CONTACT** section
To select in file: **Maintain File > Financial Information > Agent (under Listing Broker Name)**
- This Company** in **COMPANY** section
NOTE: if multiple offices are entered in the system then instead go to the **Settlement Agency** portion of the Rolodex. If you have multiple offices, then to select the correct one go within the file to **Maintain File > Miscellaneous Change > Settlement Agency**
- This Company (or Settlement Agency** if multiple offices are entered) in **CONTACT** section
To select in file: **Maintain File > Miscellaneous Change > Closer**