

## REQUIRED PROVIDERS OF SETTLEMENT SERVICES

Addendum to Loan Estimate

**NOTE:** This form is used by a loan broker as an addendum to the Loan Estimate when arranging a consumer mortgage secured by one-to-four residential property, to notify the borrower of specific providers required by the loan broker to perform settlement services.

**DATE:** \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_, California.

**TO BORROWER/APPLICANT:**

Applicant's name \_\_\_\_\_  
Property address \_\_\_\_\_  
\_\_\_\_\_

**FROM BROKER/LENDER:**

Broker's name \_\_\_\_\_ CalBRE #: \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_

1. This notice regards your loan application number \_\_\_\_\_.
2. Broker/Lender requires the use of a particular provider for specific settlement services or will select a particular provider from a Broker/Lender-controlled list.
  - 2.1 The estimate of the charges for these settlement services stated in the Loan Estimate is based on the charges of the particular providers required or, if Broker/Lender will select from among a Broker/Lender-controlled list, the Loan Estimate contains a range of costs from the required providers on the list. [See **RPI** Form 204-5]
  - 2.2 The name and exact cost of the provider selected by Broker/Lender will be specified on the Closing Disclosure or HUD-A1 Settlement Statement. [See **RPI** Forms 402 and 402-1]
3. The following are settlement service providers required by Broker/Lender to be used.

Settlement Services	Name, Address, and Telephone Number of Provider	Nature of Broker/Lender Relationship with the Service Provider
3.1	Name _____ Address _____ _____ Phone _____	
3.2	Name _____ Address _____ _____ Phone _____	
3.3	Name _____ Address _____ _____ Phone _____	
3.4	Name _____ Address _____ _____ Phone _____	
3.5	Name _____ Address _____ _____ Phone _____	

Settlement Services	Name, Address, and Telephone Number of Provider	Nature of Broker/Lender Relationship with the Service Provider
3.6	Name _____ Address _____ _____ Phone _____	
3.7	Name _____ Address _____ _____ Phone _____	
3.8	Name _____ Address _____ _____ Phone _____	

4. For each of the following settlement services, Broker/Lender will select the provider from among a Broker/Lender-controlled list of five (5) or more providers.

Settlement Service
Type
Type
Type
Type

**I have received and read a copy of this notice.**

Date: \_\_\_\_\_, 20\_\_\_\_\_

Applicant's name: \_\_\_\_\_ Applicant's name: \_\_\_\_\_

Signature: \_\_\_\_\_ Signature: \_\_\_\_\_

Applicant's name: \_\_\_\_\_ Applicant's name: \_\_\_\_\_

Signature: \_\_\_\_\_ Signature: \_\_\_\_\_