

# **Stewart Title Guaranty Company**



*Landtech* provides built-in integration with Stewart Title Guaranty Company's web based underwriter service. This enables you to access their web based service from within *Landtech* to request and receive Closing Protection Letters (CPL) and title insurance policy jackets.

#### Initializing Stewart Title's Underwriter Service

To activate the Stewart Title Guaranty Company's underwriter service in *Landtech*, you must enter your logon ID and password. These are provided by Stewart Title. To do so, you will need to access the *Company* database.

• Click on <u>*Data Entry*</u> on the menu bar or press ALT + D. The <u>*Data Entry*</u> drop-down menu will be displayed.



• Click on *Database* or press **B**. The *Databases* dialog box will be displayed with the *Company* database presented first.

- Dottobases - Company				
Company	<< Eirst < Prev	Next> Last>>		
Lender	<u> </u>	hu Class and Causely C. by Mumber		
Trustee	O Dy Name O	by State and County O by Number		
oan Officer	Company ID	01 ,	∧ F	Paste & E <u>x</u> it
Vortaage Broker	Branch ID	00		
Mongage Diokei	Office ID	00		<u>C</u> lose
Mtg Broker Associate	Title Name	Titles R Us		11-1-1-
Realtor	Title Address 1	1000 Main Street		Update
Realtor Associate	Title Address 2	Test address		Clear
<sup>o</sup> ayto	Title Address 3		_	
Closer/Processor	Title City, State Zip	Royal Palm Beach, Florida 33411		Add
ales Ben	Settlement Company	Titles R Us	_	
	Block H Line 2	Block H Line 2		<u>D</u> elete
Susiness Lompany	Settlement Street Ad	1000 Main Street		
lusiness Associate	Settlement 2nd Addr	2nd test address		<u>H</u> elp
Condo	Settlement City, State	Royal Palm Beach, Florida 33411	_	
Attorney	Prepared By	Steve Vogt		
Attorney Associate	Company Payto	Titles R Us		
dditional 1	Phone	561-555-9928		
dditional 2	Phone 2			Services
	Fax	561-555-3988		
Additional 3	Fax 2		4	
Additional 4	,			
Jnderwriter				

There is a button located on the lower right of the *Company* database dialog box labeled *Services*. Clicking this button will display a dialog box enabling you to enter your logon ID and password for Stewart Title Guaranty Company's underwriter service.

- To enter your logon ID and password, click \_\_\_\_\_\_. The *Services* dialog box will be displayed.
- Click on the *Stewart* button to display the Stewart Title Guaranty Company's initialization screen.

Services						X
Company Name:						
Underwriter Lien or Title Search	Recording	Marketing	Survey	Web Emails	Notaries	<u>O</u> k
						Cancel
						Holp
Agents National Title	cto	Mort				
	SIC	vvall				
CATIC Title	► title gu	aranty company				
First American						
FNTG						
Investors Title						
North American						
Old Republic						
Security Little						
The Fund		🔲 Use Individua	al ID			
Title Resources - TR	ID <sup>.</sup>					
Westcor	Deserverd					
WFG	Passwurd.					
	C Show Pass	word				
	J SHOW Fass	word				

Stewart Title Guaranty Company's underwriter service may require a unique logon ID and password for each user. If this is the case, all you have to do is click on the *Use Individual ID* check box to activate the Stewart Title Guaranty Company's underwriter service. Each user will then be prompted for their logon ID and password each time they access the Stewart Title Guaranty Company's underwriter service.

However, fields for a logon ID and password are provided in the event there should only be one set of logon credentials for your office for the Stewart Title Guaranty Company's underwriter service. If this is the case, you can enter your logon ID and password here and this ID and password will always be used to access the Stewart Title Guaranty Company's underwriter service. You will not be prompted to enter your ID and password each time you access the Stewart Title Guaranty Company's underwriter service.

- If you are entering your logon ID and password here, click on the *ID* text box and enter your logon ID.
- Click on the *Password* text box and enter your password.
- If you would like to see the password as you enter it, click on the *Show Password* check box. Doing so will help to ensure that you have entered your password correctly.

**Note:** The *Show Password* check box will only be available the first time you enter your logon credentials. Once you save the credentials by closing the *Services* dialog box, you will no longer have the option to see your password.

• Click  $Q^k$  or press ALT + O to save the initialization and close the *Services* dialog box.

**Note:** If you currently request Closing Protection Letters (CPL) and title insurance policy jackets from Stewart Title Guaranty Company's web service through their web portal, the logon ID and password you use should work seamlessly here. Therefore, use the same logon ID and password when initializing or accessing Stewart Title Guaranty Company's web service through *Landtech*.

This initializes Stewart Title Guaranty Company's underwriter service for the selected company only. If you have additional companies in your database also using Stewart Title Guaranty Company's underwriter service, select the company or companies in the *Company* database and repeat the initialization process explained above for each company. This only needs to be done one time for each company.

If you are in a closing file, there are a couple of additional ways you can access the *Services* dialog box.

• Click on *Services* on the menu bar or press ALT + V. The *Services* drop-down menu will be displayed.

Service	s	
In	itialize Services	
U	nderwriter	>
Po	ortals	>
Li	en or Title Search	>
Re	ecording	>
М	larketing	>
Su	urvey	>
N	otaries	>
Vi	ew Emails	

- Click on *Initialize Services*. The *Services* dialog box will be displayed.
- You can also click on the *Initialize Services* toolbar button with to access the *Services* dialog box.
- And finally, there is a button labeled *Services* on the *Settlement* screen of the *HUD Page 1 General Information* dialog box in *Landtech XML* and the *Settlement* screen of the *CD 1 General Information* dialog box in *Landtech cfpb* that will enable you to gain access to the *Services* dialog box.

🖌 Hud Page1 General Information - Settlement 🛛 🕹 🗙						
	Settlement Information	I		1		
Settlement	Type of Loan 🛛 🚺	eterans Administration	🗖 Refinance/ 🔲 Use HUD-1A			
File Info		Date Time	Equity Line of Credit	<u>0</u> k		
Business Sources	Settlement 10/0	1/13 📰 💽 😒	Proration Date 10/01/13 🛃	Cancel		
Business Company 1		24	Disbursement Date 10/01/13 🛃			
Business Company 2			Recision Date	<u>R</u> ecording		
Attorney 1			Order Date			
Attorney 2		2	Anchor Date 03/20/14			
HUD Footnotes	í í		GFE Date	<u>H</u> elp		
			Recording File PALM.FL			
		24	County: Palm Beach			
	1					
	Current Default Compa	יען [01-00-00]				
	Company Number	01-00-00	🔺 🗁	Services		
	Title Name	Titles R Us				
	Title Street	1000 Main Street				
	Title Address 2	Test address				
	Title Address 3					
	Title City, State, Zip	Royal Palm Beach, Florida 33411				
	Settlement Company	Titles H Us				
	Block H Line 2	Block H Line 2				
	Settlement Street Addr	2nd test address				
	Settlement Zhu Adules	in Royal Palm Reach, Florida 22411				
	Prenared Bu	Steve Voot				

😂 CD 1 General Inform	nation - Settlement			×
	Settlement Information —			7
Settlement File Info	Loan Purpose Purch	ase 👤	□ Refinance/ Use Alternative Without Seller □ cfpb Format	<u>0</u> k
	Loan Product Fixed	Rate 💌		Cancel
	Type of Loan Conve	entional Loan Uninsured 📃 💌	Other Type	Recording
	Da	ate Time		
	Settlement 06/29/1		Proration Date         06/29/16         2           Disbursement Date         06/29/16         2           Recision Date         2         2	
			Order Date	<u> </u>
		21	Anchor Date	
		24	Estimate Date	
	I		Recording File  BAY.FL 🥖	
			County: Bay	
	Current Default Company	[01-00-00]  Use as Contact C Attorney 1	Contact C Closer Pr C SalesRe     Attorney 2 C Attorney 3 C Attorney	p 4 Services
	Company Number	01-00-00		<b>)</b>
	Title Name	Titles R Us		
	Title Street	1000 Main Street		Settlement as
	Title Address 2	Test address		Contact
	Title Address 3			
	Title City, State, Zip	Royal Palm Beach, Florida 33411		
	Settlement Company	Titles R Us		
	Block H Line 2	Block H Line 2		
	Settlement Street Address	1000 Main Street		
	Settlement 2nd Address	Znd test address		
	Settlement Lity, State ∠ip	Proyai maim Beach, Fiorida 33411		
	Company Paulo	Titlee P Lle		
	Phone	FRES FLOS		
	Phone 2	301-333-3320		
	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			

Once initialized, the *Product Display* and *Stewart* items become available and ready for use on the *Underwriter* menu under the *Services* menu bar item in *Landtech*.

cfpb	Landt	ech cfp	ob - [Clos	ing Dis	closure Pa	ge 1: 2021012	8.LT]							
- <sup>sp</sup> _1	<u> </u>	<u>E</u> dit	F <u>o</u> rms	<u>X</u> ML	Ser <u>v</u> ices	<u>D</u> ata Entry	<u>A</u> ccessorie	es <u>S</u> ettin	gs Ut <u>i</u> li	ties	Es <u>c</u> row	<u>G</u> enera	I Reports	
	) »	> 🖥	] 🍃		Initi	alize Services		pb cfpb	cfpb 2a	<b>≥</b> E		24	<b>∆ r</b> ⇔r.	
					<u>U</u> nd	erwriter	>	Pro	duct Disp	olay				
					Port	als	>	Ag	ents Natio	onal	Title			
					Lien	or Title Sear	ch >	Alli	ant Natio	nal				
			-		Rec	ording	>	CA	ΠC					
	CI	0	sin		Mar	keting	>	CA	IC Title					
				5	Surv	vey	>	Firs	t America	an				
					Not	aries	>	FN.	ſG					
				-	Viev	v Emails		Inv	estors Titl	le				
	C	los	ing l	nfor	matio	on		No	th Ameri	ican				
	Da	te Is	ssued	I		Í	0/28/2	Old	Republic	5				
	CI	osin	a Dat	е		1	2/22/2	Sec	urity Title	2				
	Di			-	-1-		2/22/2	Ste	wart					
		spui	seme	ent D	ate		212212	The	Fund					
	Se	ttle	ment	Agei	nt	Т	itles R	Titl	e Resourc	es - '	TR			
	Fil	e #				2	02101	We	stcor					
	Pr	ope	rty			1	234 M	WF	G					

### Using the Stewart Title Underwriter Service

The *Stewart* selection on the *Underwriter* menu enables you to request and receive Closing Protection Letters (CPL) and title insurance policy jackets from Stewart Title's web based service.

To request a title product from the Stewart Title's web service, you must be in an open closing file.

- While in an open closing file, click on *Services* on the menu bar or press ALT + V. The *Services* drop-down menu is displayed.
- Position the mouse pointer on <u>Underwriter</u> or press U.

Ser <u>v</u> ices	
Initialize Services	
<u>U</u> nderwriter >	Product Display
Portals >	Agents National Title
Lien or Title Search	Alliant National
Recording >	CATIC
Marketing >	CATIC Title
Survey >	First American
Notaries >	FNTG
View Emails	Investors Title
	North American
	Old Republic
	Security Title
	Stewart
	The Fund
	Title Resources - TR
	Westcor
	WFG

• Click on *Stewart*.

7

If you only use a single set of logon credentials for your office, the *Landtech Stewart Integration* dialog box will be displayed immediately.

If each user must have unique logon credentials, you will be prompted to enter your logon credentials in order to access the underwriter service.

🔄 Stewart Sign On Info	×
Company Name: Titles R Us	
ID: Password:	
C Show Password	<ul> <li>Remember Me</li> <li>Remember Me &amp; Password</li> </ul>
Delete	<u>O</u> k <u>C</u> ancel

- Enter your logon ID in the *ID* text box.
- Enter your password in the *Password* text box.
- If you would like to see the password as you enter it, click on the *Show Password* check box. Doing so will help to ensure that you have entered your password correctly.

**Note:** The *Show Password* check box will only be available the first time you enter your logon credentials. Once you save the credentials, you will no longer have the option to see your password.

- If you would like the program to remember your logon ID so that you do not have to enter it every time, click on the *Remember Me* check box. From this point forward, each time you access the product request facility, your logon ID will be loaded automatically. However, you will still have to enter your password.
- If you would like the program to remember your logon ID and password, click on the *Remember Me & Password* check box. From this point forward, each time you access the product request facility, your logon ID and password will be loaded automatically.

If you have used more than one set of logon credentials to access the product request facility, you can then use the drop-down list to select the desired logon ID.

• Click on the down arrow next to the *ID* text box.

📮 Stewart Sign On Info	×
Company Name: Titles R Us	
ID: Password:	▼ LTUser1@dev.picdev.local tpstester1@dev.picdev.loca
Show Password	<ul> <li>Remember Me</li> <li>Remember Me &amp; Password</li> </ul>
Delete	<u>O</u> k <u>Cancel</u>

- Click on the desired logon ID.
- If you want to delete a logon ID, select it from the drop-down list and click on the  $\underline{D}$  button or press ALT + D.
- Once you have entered or selected your logon credentials, click Qk or press ALT + O to continue. The *Landtech Stewart Title Insurance Company Integration* dialog box will be displayed.

///stewart	Stewart Title Insurance Company Web Site Landtech Title Insurance and Endorsements
File File Number: 20210201 Login ID: LTUser1@dev.picdev.local	CPL Jacket
Property	Loan
Property Type: Residential (1-4 family)	Loan Purpose: Purchase Closing Date 1/18/2022 Sales Price: \$300,000.00
Address 1: 1234 Main Street	Loan Number: M-39895839 Loan Amount: \$250,000.00
Address 2:	Agency
State: El City: Wellington Zio: 33414	Name: StewartAccess Test Agency *
County Palm Reach	Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 *
	Branch: Include All Branches
Legal Desc: Lot 79, Block 120, Ocean View Subdvision, Paim Beach County, Florida.	CPL Options
Lender Information	Type Lender Buyer Seller
Name: Bank of America	CPL Form FL Closing Protection Letter v
Address 1: 7105 Corporate Drive	Effective Date: 5/19/2022
Address 2:	Lender Clause  Y
City: Plano State: TX Zip: 75024-4100	Attention:
its suscessors and/or assigns	Search Approved Attorney
Lender Clause: Its successors and/or assigns	Search Secondary Agency
Agent Information	Search Settlement Company
Name: Titles R Us Contact: Steve Vogt	View CPL(s) Get CPL
Address 1: 1000 Main Street Address 2:	Active CPL(s)
City: Royal Palm Beach State: Florida Zip: 33411	CPL Number Type Status Created Date
Email: closings@titlesrus.com Phone: 5615559928 Fax: 56155539	18
Borrower	
Party Type Last Name First Name Middle Name Company Name Long Name St	itus
INDIVIDUAL Johnson James hi	wife
INDIVIDUAL Harper Charles	
INDIVIDUAL Harper Jane hi	wife
Seller	
Party Type Last Name First Name Middle Name Company Name Long Name S	ıtus
INDIVIDUAL Williams Bill INDIVIDUAL Williams Nancy bi	wife
INDIVIDUAL Bennett Robert	PPE Edit CPL Fee View All Close
INDIVIDUAL Report Colly	wife

This dialog box populates automatically with the information from the closing file necessary to request Closing Protection Letters (CPL) and title insurance policy jackets.

Also, different agents/states/jurisdictions may have additional or different categories of items to select from. Whatever is appropriate for your company will be presented.

The *File* section in the upper left area of the dialog box shows the *Landtech* closing filename or number and your Stewart Title user logon ID.

File		
File Nu	mber: 20210137	Login ID: LTUser1@dev.picdev.local

The information shown in the *Property*, *Lender Information*, *Agent Information*, *Borrower* and *Seller* sections is pulled automatically from the current open closing file.

The *Lender Information* section has a field for a lender or mortgage clause. If a lender or mortgage clause had been entered in the *Landtech* closing file, it will appear in this field. When requesting a CPL, if you do not select a mortgage clause in the *CPL Options* section, the clause in this field will be used by default.

Lender Informat	tion			
Name:	Bank of Ameri	ica, NA		
Address 1:	1500 Central A	we.		
Address 2:				
City:	Atlanta	State: GA	Zip: 30032	
Lender Clause:	its successors	and/or assigns		0

There are two links in the upper right area of the screen provided for convenience. The first one is a direct link to the Stewart Title Insurance Company web portal. Therefore, you can click on the *Stewart Title Insurance Company Web Site* link and go directly to their web portal from within *Landtech*.

The second link is a summary form of the title insurance and endorsement premiums that were entered in the closing file in *Landtech*. Clicking on the *Landtech Title Insurance and Endorsements* link will display the form shown below.

Title Insurance & Endorsements Wind	dow						-		×
Owner's Premium			- Loan Premiu	Jm					
Effective Date:	12/22/2021			Effec	tive Date: 12/	22/2021			
Coverage:	300,000.00			C	Coverage: 250	,000.00			
Total Premium:	1,330.00			Total	Premium: 25.0	00			
Agent Premium:	931.00			Agent	Premium: 17.	50			
Underwriter Premium:	399.00			Underwriter	Premium: 7.50	D			
Endorsement Title		Premium		Underwriter Due	Net Pr	remium			
ALTA 8.1 Environmental Protection		25.00		7.50	17.50				$\sim$
ALTA 5.0 PUD Endorsement		25.00		7.50	17.50				
ALTA 9.1 Endorsement		135.50		40.65	94.85				
ALTA 5.1 PUD Endorsement		25.00		7.50	17.50				$\sim$
								OK	

This can be used as a reference as you request CPLs and title insurance policy jackets. The form is separate so with multiple monitors you may move it to another monitor so it remains open while you request title products.

**Note:** The product request and title insurance and endorsements screens are in Windows Presentation Foundation (WPF) format and are scalable. You can adjust the size of the screen to your liking and the size will be remembered on subsequent openings.

## **Requesting a Closing Protection Letter (CPL)**

The CPL tab contains the information and options available for the CPL request.

CPL		Jacket								
loan										
Loan Purpose: Pure	hase Closi	ng Date 1/18/202	2 Sales Pri	ce: \$300,000.00						
Loan Number: M-3	9895839		Loan Amou	nt: \$250,000.00						
Agency										
Name:	StewartAccess T	est Agency		v						
Location:	StewartAccess T	awartAccess Test Agency Inc - 1980 Post Oak Suite 800								
Branch:	Include All Brand	thes		v						
CPL Options										
Coverage Options:	✓ Lender	Buyer	Se	ller						
CPL Type:	FL Closing Prote	ction Letter		¥						
Effective Date:	3/17/2022	15								
Mortgage Clause:	Please Select a l	Mortgage Clause		v						
Attention:										
Search Secondar	/ Agency									
Search Settlemer	t Company									
		Viev	v CPL(s)	Get CPL						
Active CPL(s)				_						
Reference	# Name	1	Status	Created Date						

- The information in the *Loan* section is pulled from the current open closing file in *Landtech*.
- In the *Agency* section, the *Name* field will default to your company provided there is only one company associated with your account. If you have more than one company registered with Stewart Title you will need to select the company. Click on the down arrow v next to the *Name* field and select the desired company from the drop-down list.

	CPL		Jac	ket		
.oan	_		<b>C 1 1 1 1</b>		6 I D.	*****
Loan Pur	pose: Pure	hase	Closing Date	1/18/2022	Sales Price:	\$300,000.00
Loan Nur	mber: M-3	9895839			Loan Amount:	\$250,000.00
Agency						
	Name:	Stewart/	Access Test Ager	icy		•
	Location:	Stewart/	Access Test Agen	cy		
	Branch:	Include	All Branches			~
CPL Optio	ns					
Coverag	e Options:	✓ Len	der	Buyer	Seller	
	CPL Type:	FL Closi	ng Protection Le	tter		v
Effe	ctive Date:	3/17/20	22 1	15		
Mortga	ge Clause:	Please S	elect a Mortgag	e Clause		v
	Attention:					
Searcl	h Secondar	y Agency				
Search	h Settlemer	nt Compa	ny			
				View CP	L(s)	Get CPL
	(s)					
Active CPL		#	Name	Statu	IS	Created Date

The *Location* field defaults to the address associated with the company selection in the *Name* field. If your company has more than one location and the address shown is not the correct address, click on the down arrow rext to the *Location* field and select the correct address.

CPL		Jac	ket		
Loan					
Loan Purpose: Pure	thase	Closing Date	1/18/2022	Sales Price:	\$300,000.00
Loan Number: M-3	9895839			Loan Amount:	\$250,000.00
Agency					
Name:	Stewart	Access Test Agen	icy .		v
Location:	Stewart	Access Test Agen	cy Inc - 1980 Po	st Oak Suite 80	v 00
Branch:	Stewart/	Access Test Agen	cy inc - 1980 Po	st Oak Suite 80	00
CPL Options	SA Test /	Agency with 100	) characters in t	he Legal Name	100 character
Coverage Options:	Stewart/	Access Test Agen	cy Inc - 788 W S	Sam Houston P	kwy N Suite 20
coverage options.			buyer	Seller	
CPL Type:	FL Closir	ng Protection Let	tter		۷
Effective Date:	3/17/202	22 1	5		
Mortgage Clause:	Please S	elect a Mortgag	e Clause		U
Attention:					
Search Secondar	y Agency				
<ul> <li>Search Settlemer</li> </ul>	nt Compa	ny			
			View CPL	(s)	Get CPL
Active CPL(s)					
Reference	#	Name	Status		Created Date

• The *Branch* field enables you to specify whether or not to include other locations or entities for the CPL request. Click on the down arrow react to the *Branch* field and select the desired option.

Loan Purpose: Purc	:hase	Closing Date	1/18/2022	Sales Price:	\$300,000.00
loan Number: M-3	9895839			Loan Amount:	\$250,000.00
gency					
Name:	StewartA	Access Test Agen	ey 🛛		~
Location:	StewartA	ccess Test Agen	cy Inc - 1980 Po	ost Oak Suite 80	o ~
Branch:	Include A	All Branches			v
PL Options	None				- F
Coverage Options:	Include /	All Branches			
CPI Type:	Corp Ad	min Office			
CPL type.	biait rest				
Effective Date:	3/1//202	1	5		
Mortgage Clause:	Please S	elect a Mortgage	e Clause		v
Attention:					
Search Secondary	Agency				
Search Settlemen	it Compar	ıy			
			View CPL	.(s)	Get CPL
ctive CPL(s)					
Reference	#	Name	Statu	5	Created Date

The coverage options available in your state or jurisdiction are indicated by a check box next to the party. If there is no check box, then that coverage option is not available. The default coverage option is *Lender*. You can only select one coverage option per CPL. Therefore, if you attempt to select a different coverage option, the previously selected option is automatically deselected.

oan		Jac	Ket		
Loan Purpose: Pure	:hase	Closing Date	1/18/2022	Sales Price:	\$300,000.00
Loan Number: M-3	9895839			Loan Amount:	\$250,000.00
gency					
Name:	Stewart	Access Test Ager	icy		~
Location:	Stewart	Access Test Ager	icy Inc - 1980 P	ost Oak Suite 80	× 0
Branch:	Include	All Branches			۷
PL Options					
Coverage Options:	✓ Len	der	Buyer	Seller	
CPL Type:	FL Closir	ng Protection Le	tter		¥
Effective Date:	3/17/202	22 1	15		
Mortgage Clause:	Please S	elect a Mortgag	e Clause		v
Attention:					
Search Secondar	y Agency				
Search Settlemer	nt Compa	ny			
			View CP	PL(s)	Get CPL
ctive CPL(s) Reference	#	Name	Statu	IS	Created Date

• If there is only one CPL type for your state or jurisdiction, the *CPL Type* field will default to that CPL type. However, if your state or jurisdiction offers more than one type of CPL, you will need to select the one you want. Click on the down arrow vert to the *CPL Type* field and select the desired CPL from the drop-down list.

pan _					
Loan Purpose: Purc	hase:	Closing Date	1/18/2022	Sales Price	£ \$300,000.00
oan Number: M-3	9895839			Loan Amoun	t: \$250,000.00
gency					
Name:	Stewart	Access Test Age	ncy		v
Location:	Stewart	Access Test Age	ncy Inc - 1980	0 Post Oak Suite	800 👻
Branch:	Include	All Branches			v
PL Options					
Coverage Options:	🗸 Len	der [	Buyer	Selle	er
CPL Type:	FL Closir	na Protection Le	tter		v
	FL Closir	ng Protection Le	tter		
Effective Date:					
Mortgage Clause:	Please S	elect a Mortgag	ge Clause		v
Attention:					
Search Secondary	/ Agency				
Search Settlemen	it Compai	ny			
			View	CPL(s)	Get CPL
ctive CPL(s)					
Reference	#	Name	Sta	atus	Created Date

• The *Effective Date* field defaults to the current system (today's) date. If you need a different date, click in the *Effective Date* field and enter the desired date. You can also click on the calendar icon **15** and select the date from the pop-up calendar.

Loan Purpose: Purc	hase		Clo	osing	g Da	te	1/18/	/2022	Sales	Price:	\$300,000.	00
Loan Number: M-3	989583	9							Loan An	nount:	\$250,000.	00
gency												
Name:	Stewar	rtAc	cess	Tes	t Ag	ency	/					
Location:	Stewar	tewartAccess Test Agency Inc						- 1980 Po	st Oak S	uite 80	o ~	
Branch:	Includ	e All	Bra	inch	es						v	
PL Options												
Coverage Options:	V Le	ende	er				Buy	er		Seller		
CPL Type:	FL Clo	sing	Pro	tect	ion	.ette	er				v	
Effective Date:	3/17/2	022				15						
Mortgage Clause:	•		Ma	rch 2	2022		►				v	
Attention:	Su	Мо	Tu	We	Th	Fr	Sa					1
) Search Secondary	27	28 7	1	2	3 10	4	5 12					
Search Settlemen	13	14	15	16	17	18	19					
~	20	21	22	23	24	25	26					_
	3	4	5	6	7	8	9	ew CPL	(s)		Get CPL	
ctive CPL(s)										_		
Reference	#	1	Nam	ie -				Status	5		Created Da	ite
												_

• If you need a lender or mortgage clause for the lender on the Lender CPL, you can select one from the *Mortgage Clause* field. Click on the down-arrow next to the *Mortgage Clause* field and select the desired lender or mortgage clause from the drop-down list.

CDI		la alvas		
CPL		Jacket		
Loan Purpose:	Purchase Clo	sing Date 1/18/2022	Sales Price: \$30	0 000 00
Loan Purpose.	N 20005020	sing bate 1/10/2022	Sales Price. \$50	
Loan Number:	M-39895839		Loan Amount: \$25	3,000.00
Agency				
Na	me: StewartAccess	Test Agency		~
Locat	ion: StewartAccess	Test Agency Inc - 1980 F	ost Oak Suite 800	~
Brar	nch: Include All Bra	nches		~
CPL Ontions				
Coverage Optic	ons: 🔽 Lender	Buver	Seller	
CPL Tj	ype: FL Closing Prot	ection Letter		*
Effective D	ate: 3/17/2022	15		
Manager Cla				
wortgage Cla	use: Please Select a	Mortgage Clause		
Attent	ion:	crotany of Houring and I	Irban Development I	
Search Secor	ndan ISAOA	cretary of Housing and t	rban Development, is	AUA AIII
Search Settle	emer ISAOA/ATIMA			
	Its Successors	And Assigns As Their Int	erest May Appear	
	Its Successors	And/Or Assigns		
Active CPL(s)	Its successors a	and		
Refere	Its successors a	and or assigns as their in	terests may appear.	
	Its successors a	and/or administrator of v	eteran affairs and/or	assigns, a
	Its successors a	ind/or assigns		
	Its successors a	ind/or assigns as their in	terest may appear as	defined ir
	and each succe	ssor in ownership of the	indebtedness secure	d by the i
	and/or Secreta	ry of Housing and Urbar	Development, its res	pective su
	and/or Secreta	ry of Veterans Affairs and	J/or its respective suc	cessors ar
	and/or the Sec	retary of veterans Attains	, an Officer of the United and American	ted States
	solely as nomi	nee for *. Its Successors /	and/or Assigns as The	ir Interest

If you make a selection in the *Mortgage Clause* field, that will supersede a lender or mortgage clause entered in the closing file.

However, if you do not select a lender or mortgage clause but a lender or mortgage clause had been entered in the closing file, that clause will be included on the CPL by default. As previously mentioned, the lender or mortgage clause entered in the closing file will be displayed in the *Lender Clause* field in the *Lender Information* section.

Lender Informat	tion			
Name:	Bank of Ameri	ica, NA		
Address 1:	1500 Central A	we.		
Address 2:				
City:	Atlanta	State: GA	Zip: 3	0032
Lender Clause:	its successors	and/or assigns		$\hat{\mathbf{v}}$

If you do not select a lender or mortgage clause and there was no lender or mortgage clause entered in the closing file, then there will be no lender or mortgage clause on the CPL.

• If the CPL needs to be made to the attention of a particular individual or department, enter the name or department in the *Attention* field.

CPL		Jac	:ket					
oan	_							
Loan Purpose: Purc	hase	Closing Date	1/18/2022	Sales Price:	\$300,000.00			
Loan Number: M-3	9895839			Loan Amount:	\$250,000.00			
gency								
Name:	StewartAcc	ess Test Age	ncy		~			
Location:	StewartAcc	ess Test Age	ncy Inc - 1980 P	ost Oak Suite 80	× 00			
Branch:	Include All	Branches	s					
PL Options								
Coverage Options:	✓ Lender	r [	Buyer	Seller	r			
CPL Type:	FL Closing	Protection Le	tter		Ŷ			
Effective Date:	3/17/2022	[	15					
Mortgage Clause:	Its successo	ors and or as	signs as their int	erests may app	ear. 💉			
Attention:	Phil Seymor	e						
Search Secondary	Agency							
<ul> <li>Search Settlemen</li> </ul>	t Company							
			View CPI	.(s)	Get CPL			
ctive CPL(s)								
Reference	# N	lame	Statu	5	Created Date			

If an approved attorney is required in your state or jurisdiction, you will have the ability to select one. If not, a field for *Approved Attorney* will not be presented. The property in the sample file that we are using has an address in a state that does not require an approved attorney. Therefore there is no selection for an approved attorney. However, in the screen shot below, the property address is in a state that uses approved attorneys. Therefore, a field is provided for entering or selecting an approved attorney.

CPL		lacket		
Loan				
Loan Purpose: Pure	thase Closing Da	ate 1/18/2022	Sales Price:	\$300,000.00
Loan Number: M-3	9895839		Loan Amount:	\$250,000.00
Agency				
Name:	StewartAccess Test Ag	ency		~
Location:	StewartAccess Test Ag	ency Inc - 1980 P	ost Oak Suite 80	ю v
Branch:	Include All Branches			~
CPL Options				
Coverage Options:	✓ Lender	Buyer	Seller	
CPL Type:	GA Single Transaction	CPL Lender, Purc	haser	¥
Effective Date:	3/17/2022	15		
Mortgage Clause:	Its successors and or	assigns as their int	terests may app	ear. *
Attention:	Phil Seymore			
Search Approved	Attorney			
Search Secondary	/ Agency			
		View CPI	L(s)	Get CPL
Active CPL(s)				
Reference	# Name	Statu	s	Created Date

• In order to find and select an approved attorney, you must do a search. Click on the down arrow O next to *Search Approved Attorney* to expand the approved attorney section.

	CPL			Jack	æt					
.oan -	_			-						
Loan Pu	urpose: Purc	:hase	Closing	g Date	1/18/20	22	Sal	es Price	\$300	),000.00
Loan N	umber: M-3	9895839					Loan A	Amount	\$250	0,000.00
Agency										
	Name:	Stewart	Access Tes	t Agen	y					~
	Location:	Stewart	Access Tes	t Agen	cy Inc - 1	980 Pc	ost Oak	: Suite 8	00	~
	Branch:	Include	All Branch	es						v
CPL Opt	ions									
Covera	age Options:	✓ Ler	nder		Buyer		Γ	Selle	r	
					-			-		
	CDI Trans	CASIN	de Terrere	tion CD		Dural				ч
	CPL Type:	GA Sing	gle Transac	tion CP	L Lender,	Purch	naser			۷
Eff	CPL Type: fective Date:	GA Sing 3/17/20	gle Transac	tion CP	L Lender,	, Purch	naser			۷
Ef Mort <u>o</u>	CPL Type: fective Date: gage Clause:	GA Sing 3/17/20 Its succ	gle Transac 022 sessors and	tion CP 1	L Lender, 5 gns as th	Purch	erests i	may apt	pear.	*
Efi Mortg	CPL Type: fective Date: gage Clause: Attention:	GA Sing 3/17/20 Its succ Phil Sey	gle Transac 022 essors and more	tion CP 1	L Lender, 5 gns as th	, Purch	erests i	may app	pear.	~
Eff Mortg	CPL Type: fective Date: gage Clause: Attention: rch Approved	GA Sing 3/17/20 Its succ Phil Sey Attorne	gle Transac 122 essors and more y	tion CP 1	L Lender,	, Purch	erests i	may app	bear.	~
Eff Mortg Sear Name:	CPL Type: fective Date: gage Clause: Attention: rch Approved	GA Sing 3/17/20 Its succ Phil Sey Attorne	gle Transac 022 messors and more y City:	tion CP 1	5 gns as th	, Purch	erests i State:	may apt	bear.	2 2
Eff Mort <u>o</u> Nome: Zip:	CPL Type: fective Date: gage Clause: Attention: rch Approved	GA Sing 3/17/20 Its succ Phil Sey Attorne	gle Transac 222 more y City: Country:	tion CP	L Lender,	eir int	erests i State:	GA	bear. Search	۷ ۷
Eff Mortg Sear Name: Zip:	CPL Type: fective Date: gage Clause: Attention: ch Approved	GA Sing 3/17/20 Its succ Phil Sey Attorne	gle Transac 022 essors and more y City: Country:	tion CP	gns as th	eir int	erests i State:	GA	Search	~
Eff Mort <u>o</u> Name: Zip:	CPL Type: fective Date: gage Clause: Attention: tch Approved Approved At	GA Sing 3/17/20 Its succ Phil Sey Attorne	gle Transac 122 essors and more y City: Country:	tion CP	gns as th	eir int	erests   State:	GA GA Favo	Search	v v
Eff Mort <u>o</u> Name: Zip: Sear	CPL Type: fective Date: gage Clause: Attention: rch Approved Approved At rch Secondar	GA Sing 3/17/20 Its succ Phil Sey Attorney ttorney: y Agency	gle Transac 122 more y City: Country:	tion CP	gns as th	eir inte	erests i State:	GA GA Favo	Search	v v
Eff Mortg Sear Name: Zip: 文 Sear	CPL Type: fective Date: gage Clause: Attention: cch Approved Approved At cch Secondar	GA Sing 3/17/20 Its succ Phil Sey Attorne ttorney: y Agency	gle Transac 222 more y City: Country:	tion CP	L Lender,	eir inte	erests i State:	GA GA Favo	Search Search Orite? Get	v v v
Eff Mortg Name: Zip: Sear Active C	CPL Type: fective Date: gage Clause: Attention: tch Approved Approved At rch Secondar PL(s)	GA Sing 3/17/20 Its succ Phil Sey Attorne ttorney: y Agency	gle Transac 22 essors and more y City: Country: /	tion CP	L Lender,	eir int	erests i State: v	GA GA Favo	Search Search Get	v v v

• You can conduct the search by any of the fields provided. Enter the desired search criteria and click on the **Search** button.

	CPL			Jacket				
Loan Pu	irpose: Purc	hase	Closin	g Date 1/1	18/2022	Sal	es Price:	\$300,000.00
Loan Nu	umber: M-3	9895839		-		Loan A	Amount:	\$250,000.00
Agency								
	Name:	Stewart	Access Tes	at Agency				v
	Location:	Stewart	Access Tes	at Agency Ir	nc - 1980 i	Post Oak	: Suite 80	× 00
	Branch:	Include	All Branch	nes				v
CPL Opti	ons							
Covera	ge Options:	🗸 Ler	der	B	uyer	Γ	Seller	
	CPL Type:	GA Sing	le Transac	tion CPL Le	ender, Pure	chaser		~
Eff	ective Date:	3/17/20	22	15				
Mortg	age Clause:	Its succ	essors and	l or assigns	as their ir	iterests i	may app	ear. *
	Attention:	Phil Seyr	more					
🔿 Sear	ch Approved	Attorney	/					
Name:			City:	Atlanta		State:	GA	~
Zip:			Country:				S	earch
	Approved At	torney:				~	Favo	rite?
🕑 Sear	ch Secondary	/ Agency						
A	21.6-2				View CF	PL(s)		Get CPL
Active Ci	Reference	#	Name		Stati	us		Created Date
	vererence		A LOUGE		Juan			created pate

• The results will populate the *Approved Attorney* drop-down list. To select the desired approved attorney, click on the down arrow next to the *Approved Attorney* field.

CPL			Jacket						
Loan									
Loan Purpose: Pure	thase	Closin	g Date 1/18/2022	Sa	les Price:	\$300,00	0.00		
Loan Number: M-3	9895839			Loan	Amount:	\$250,00	0.00		
Agency									
Name:	Stewart	Access Tes	st Agency				~		
Location:	Stewart	Access Tes	st Agency Inc - 1980	Post Oal	k Suite 80	0	~		
Branch:	Include	All Branch	ies				~		
CPL Options									
Coverage Options:	🗸 Ler	der	🗌 Buyer	[	Seller				
CPL Type:	GA Sing	le Transac	tion CPL Lender, Pur	chaser			۷.		
Effective Date:	3/17/20	22	15						
Mortgage Clause:	Its succ	essors and	l or assigns as their i	nterests	may app	ear.	÷		
Attention:	Phil Seyr	more							
Search Approved	Attorney	/					-		
Name:		City:	Atlanta	State:	GA		÷		
Zip:		Country:		]	S	earch			
Approved At	ttorney:			~	Favor	rite?			
Search Secondar	y Agency						_		^
<u> </u>		BC Law Fi	irm, P.A. (Barry Carot	hers) - 1	870 The	Exchange			
		Lueder, Li	arkin & Hunter, LLC	Brendar	n Hunter)	- 3535 Pi	edmo	ont R	toad
Active CPL(s)		BC Law Fi	irm, P.A. (Fred Harris	on) - 187	70 The Ex	change			
Reference	#	BC Law Fi	irm, P.A. (John Papas	trat) - 18	870 The E	xchange			
		BC Law Fi	irm, P.A. (John Sward	i) - 1870	The Exch	ange			
		BC Law Fi	irm, P.A. (Thomas Jas	iki) - 187	0 The Ex	change			
		Glen Ashi	man, Attorney dba A	shman l	aw Office	e - 2791 N	viain 1	st. Class	
		Law Offic	arkin & Hunter, M	C (Law C Propdor	Hunter)	arsten ivili 2020 C-	ner, P	C La Trool	w Office of Kirsten Miller, PC) - 2921 Pleamont Road
		Lueder, L	arkin & Hunter, LLC   arkin & Hunter, LLC	loho lu	odor) 20	- 5620 Ca	amp c	Poord	C Parkway Svv
		Lueder, L	arkin & Hunter, LLC   arkin & Hunter, LLC	John Lu	eder) - 55 odor) - 29	20 Como	Croo	k Do	rieurou SM
		Lueder, L	arkin & Hunter, LLC   arkin & Hunter, LLC	Jorn Lu	eder) - So Larkin) - S	20 Camp 2525 Died	mont	Roa	reway Sw
		Lueder L	arkin & Hunter, LLC	losephi	Larkin) - 3	3820 Cam	in Cre	ek D	Parkway SW
		Lueder, L	arkin & Hunter, LIC	Laura To	oro) - 353	5 Piedmo	ont Ro	ad	
		Lueder, L	arkin & Hunter, LLC	Laura To	oro) - 382	0 Camp C	Ireek	Park	way SW
		Lueder, L	arkin & Hunter, LLC	W. Matt	thew Sub	er) - 3535	Pied	mon	rt Road
		Lueder, Li	arkin & Hunter, LLC	W. Matt	thew Sub	er) - 3820	Cam	p Cn	eek Parkway SW 🗸

• Click on the desired approved attorney. The selection will appear in the *Approved Attorney* field.

	CPL			Jack	ket			
.oan —	umore: Dur	-	Closin	o Data	1/10/202	2 5-1	or Drice:	\$200,000,00
Loan P	urpose. Purc	nase	Closin	g Date	1/10/202	2 Jai	es Price.	\$500,000.00
Loan N	lumber: M-3	9895839	,			Loan	Amount:	\$250,000.00
igency								
	Name:	Stewart	tAccess Tes	st Agen	cy (			v
	Location:	Stewart	tAccess Tes	st Agen	cy inc - 19	80 Post Oal	c Suite 80	× 0
	Branch:	Include	All Branch	nes				÷
PL Opt	tions							
Covera	age Options:	✓ Le	nder		Buyer	[	Seller	
	CPL Type:	GA Sin	gle Transad	tion CP	L Lender,	Purchaser		v
Ef	fective Date:	3/17/20	022	1	5			
	Cl				2			
Mort	gage Clause:	Its succ	essors and	d or assi	igns as the	ir interests	may app	ear. Y
Mort	gage Clause: Attention:	Its succ Phil Sey	more	d or assi	igns as the	ir interests	may app	ear. °
Morti	gage Clause: Attention: rch Approved	Its succ Phil Sey Attorne	ressors and more	d or assi	gns as the	ir interests	may app	ear. °
Morte Seal Name:	gage Clause: Attention: rch Approved	Its succ Phil Sey Attorne	rmore y City:	d or assi Atlanta	gns as the	ir interests State:	may app	ear. V
Morty Seai Name: Zip:	gage Clause: Attention: rch Approved	Its succ Phil Sey Attorne	more y City: Country:	d or assi	gns as the	ir interests State:	GA	ear. v
Morti Seal Name: Zip:	gage Clause: Attention: rch Approved	Its succ Phil Sey Attorne	wore more y City: Country: BC Law F	d or assi Atlant:	gns as the a . (Barny Ca	state:	GA GA Favor	ear. v v earch ite?
Morty Sear Vame: Zip: Sear	gage Clause: Attention: rch Approved Approved At rch Secondar	Its succ Phil Sey Attorne ttorney: y Agency	City: Country: BC Law F	Atlant:	a . (Barny Ca	ir interests State: Tother ~	GA GA Favor	ear. v v earch ite?
Morty Sear Vame: Zip: Sear	gage Clause: Attention: rch Approved Approved At rch Secondar	Its succ Phil Sey Attorne	City: BC Law F	Atlanta	a . (Barny Ca	State:	GA GA Favoi	ear. • • earch ite?
Morty Sear Name: Zip: Sear	Attention: Attention: rch Approved Approved At rch Secondar	Its succ Phil Sey Attorne ttorney: y Agency	y City: Country: /	Atlant:	gns as the a . (Barry Ca	State:	GA GA Favor	ear.
Morts Sear Name: Zip: Sear Active C	Attention: Attention: rch Approved Approved At rch Secondar (PL(s) Beference	Its succ Phil Sey Attorne ttorney: y Agency	y City: Country: BC Law F	Atlanta	gns as the a . (Barry Ca Viev	v CPL(s)	GA GA Favor	ear.

- If you would like to designate the approved attorney as a favorite, check the *Favorite*? check box.
- In some states, it is sometimes desired to have only the approved attorney appear on the CPL and not the agency. If the property resides in one of these states, you will see an additional check box labeled *Print Attorney Only*. If this option is desired, check the *Print Attorney Only* check box.

	CPL		Jac	:ket		
Loan —						
Loan Pur	pose: Pure	thase	Closing Date	1/18/2022	Sales	Price: \$300,000.00
Loan Nur	mber: M-3	9895839			Loan Am	ount: \$250,000.00
	Location:	StewartA	ccess Test Ager		) Post Oak Si	uite 800 ×
	Branch:	Include A	All Branches			v
CPL Optio	ns					
	Туре	🖌 Lend	der	Buyer		Seller
	CPL Type:	AL Single	e Transaction CF	PL Lender, Pu	irchaser, Less	ee or Borrowe 👻
Effec	ctive Date:	5/5/2022		15		
Lend	der Clause	ISAOA/A	TIMA			~
	Attention:	Jim Smith	ı			
Search	Approved	Attorney				
Name:						
City:			State: AL		<ul> <li>Zip:</li> </ul>	
Address:						Search
	Approved	d Attorney	BHM Law Gr	oup, LLC (Bra	ndc v 🗸	Favorite? Print Attorney Only
Search	n Secondar	y Agency				
				View	CPL(s)	Get CPL
Active CPL	(S)	bar	Turne	C+	atur	Created Data
		Der	type	50	atus	Created Date

You have the ability to specify a secondary agency to be included in the CPL. However, you can only select a secondary agency if you did not select an approved attorney. If you did not select an approved attorney and you want to select a secondary agency, you must do a search for the secondary agency.

• Click on the down arrow  $\odot$  next to *Search Secondary Agency* to expand the secondary agency section.

	CPL			Jacket			
oan							
Loan Pu	Irpose: Pure	:hase	Closin	g Date 1/1	8/2022	Sales Pric	e: \$300,000.0
Loan N	umber: M-3	9895839			Ь	oan Amour	t: \$250,000.0
	Branch:	Include	All Branch	ies			÷
CPL Opt	ions						
Covera	ge Options:	🗸 Ler	nder	🗌 Bu	yer	🗌 Sel	er
	CPL Type:	GA Sing	le Transac	tion CPL Ler	nder, Purcha	ser	۷
Eff	fective Date:	3/17/20	22	15			
Mortg	gage Clause:	Its succ	essors and	l or assigns a	as their inter	ests may ap	opear. *
	Attention:	Phil Seyr	more				
🔿 Sear	ch Approved	Attorney	/				
Name:			City:	Atlanta	St	ate: GA	v
Zip:			Country:				Search
	Approved A	ttorney:	BC Law Fi	rm, P.A. (Bar	ry Carother	✓ ✓ Fav	vorite?
🔿 Sear	ch Secondar	y Agency					
Name:			City:		St	ate: GA	¥
Zip:			Country:				Search
	Secondary /	Agency:				Y Fav	vorite?
Active C	DI (s)				View CPL(s	)	Get CPL
	Reference	#	Name		Status		Created Dat

• Search for and select a secondary agency in the same manner as described previously for the approved attorney.

In some states there is also the ability to select a settlement company. If that selection applies to the state the property is located in, you will see a selection for it as shown in the picture below.

CPL		Jac	:ket		
Loan					
Loan Purpose: Pu	rchase	Closing Date	1/18/2022	Sales Price:	\$300,000.00
Loan Number: M	39895839			Loan Amount:	\$250,000.00
Agency					
Name	Stewart	Access Test Ager	icy		•
Location	Stewart	Access Test Ager	ncy Inc - 1980 Po	ost Oak Suite 80	× 0
Branch	Include	All Branches			~
CPL Options					
Coverage Options	: 🗸 Ler	nder 🛛	Buyer	Seller	
CPL Type	FL Closi	ing Protection Le	tter		¥
Effective Date	3/17/20	22	15		
Mortgage Clause	Its succ	essors and or ass	igns as their int	erests may app	ear. *
Attention	: Phil Sey	more			
Search Seconda	ry Agency				
Search Settlem	ent Compa	iny			
			View CPL	.(s)	Get CPL
Active CPL(s)					Constant Date

You can only select a settlement company if you don't select an approved attorney or secondary agency. Only one of those additional entities is allowed for the CPL request.

• If you want to specify a settlement company, click on the down arrow  $\bigcirc$  next to *Search Settlement Company* to expand the settlement company section.

	CPL			Jacket					
oan									
Loan Pu	rpose: Pure	:hase	Closing [	Date 1/18/2	2022	Sale	s Price:	\$300,0	00.00
Loan Nu	mber: M-3	9895839				Loan A	mount:	\$250,0	00.00
gency									
	Name:	Stewart	Access Test A	Agency					~
	Location:	Stewart	Access Test A	Agency Inc -	1980 Po	st Oak	Suite 80	00	~
	Branch:	Include	All Branches						~
PL Optic	ons								
Coverag	ge Options:	🖌 Ler	nder	🗌 Buye	r		Seller		
	CPL Type:	FL Closi	ing Protectio	n Letter					٧
Effe	ective Date:	3/17/20	22	15					
Mortga	age Clause:	Its succ	essors and o	r assigns as	their inte	erests n	nay app	ear.	~
	Attention:	Phil Sey	more						
Searc	h Secondar	y Agency							
Searc	h Settlemer	it Compa	iny						
lame:			City:		5	state:	FL		٧
Zip:			Country:			[	S	earch	
Se	ttlement Co	mpany:				~	Favo	rite?	
				V	iew CPL	(5)		Get C	PL
ctive CP	L(s)					-/			-
	Reference	#	Name		Status			Created	Date

• Search for and select a settlement company in the same manner as described previously for the approved attorney.

Once you have all of the required information entered or selected, you can request the CPL.

- To request the CPL, click the Get CPL button. The Closing Protection Letter will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the *Digital Files Folder Path* field of the *Digital Files Access* setting under <u>Settings</u>.
- Once the CPL is received, it will show in the *Active CPL(s)* list.

	CPL			Jacket			
.oan							
Loan P	urpose: Purc	hase	Closing D	ate 1/18/20	022 Sa	les Price:	\$300,000.00
Loan N	lumber: M-3	9895839			Loan	Amount:	\$250,000.00
Agency							
	Name:	Stewart/	Access Test A	gency			~
	Location:	Stewart/	Access Test A	gency Inc - 1	1980 Post Oal	k Suite 80	o ~
	Branch:	Include	All Branches				
CPL Opt	tions						
Cover	age Options:	✓ Len	der	Buyer		Seller	
	CDI Turner	EL Clasic	Duration				
	CPL Type:	FL CIOSI	ng Protection	h Letter			*
Ef	fective Date:	3/17/20	22	15			
Mort	gage Clause:	Its succe	ssors and or	assigns as t	heir interests	may app	ear. Y
	Attention:	Phil Seyn	nore				
🔿 Sea	rch Secondar	/ Agency					
Name:			City:		State:	FL	v
Zip:	33414		Country:			S	earch
	Secondary /	Agency:	South Shore	Title, Inc 1	2798 Wi 👻	Favor	ite?
🛇 Sea	rch Settlemer	it Compa	nv				
<u> </u>							_
				Vi	ew CPL(s)		Get CPL
Active C	PL(s)		News		Centure		Constant Door
0	Keterenci	= # 50026	Name	lar CDI	Status	-	2/19/2022
the second se	oci 0900	39920	Lenc	IEI CPL	ACTIV	- 1	3/10/2022

• Clicking the Options button provides access to the options available for a CPL. The options available to CPLs are viewing, voiding and updating.

	Refe	rence #	Name		Status	Created Date
Options		596059926	Lender	CPL	Active	3/18/2022
	R	View CPL			1	
_		Void CPL				
	B.	Update CF	L			

- To view the CPL, click *View CPL*. The CPL will be displayed on your screen as a PDF.
- If you need to void a CPL, you can do so by clicking the *Void CPL* option. You will be prompted to confirm that you want to void the CPL.

Void Le	nder CPL			x
Are yo Refere	ou sure you w ence #696059	ant to 926?	VOID Lende	er CPL -
Reason:	Please Select	t a Void	d Reason	~
	YES		NO	

• You must provide a reason for voiding the CPL. Click on the down arrow  $\checkmark$  for the *Reason* field and select the desired reason for voiding the CPL.

Void Le	nder CPL			x					
Are you sure you want to VOID Lender CPL - Reference #696059926?									
Reason:	Please Selec	t a Voie	d Reason	~					
	Coverage De	clined							
	Created in Er	ror							
	Duplicate								
	No longer ap	oplies							
	YES		NO						

YES

- Click to complete the voiding of the CPL. It will no longer be shown in the *Active CPL(s)* section.
- Click if you do not want to void the CPL.
- If you clicked \_\_\_\_\_, you will see a confirmation message that the CPL has been successfully voided.

Stewart X	
CPL Product Voided!	
ОК	

• Click to continue. The CPL will no longer appear in the Active CPL(s) section.

If you need to modify any of the information contained in the CPL such as the parties to the transaction, property address, lender, lender or mortgage clause, etc, you can do so using the *Update CPL* option. Make the desired changes in the *Landtech* closing file and/or the *Attention* and *Mortgage Clause* fields on the CPL screen. Then update the CPL.

• Click the *Update CPL* option from the *Options* selections. You will be presented with a confirmation message.

Catic		×
Update/Revise this C	PL?	
Yes	<u>N</u> o	

- Click <u>Yes</u> to continue and update the CPL. The CPL will be reissued with the updated information that was submitted and with a new CPL number. The previous CPL will be voided and become inactive.
- Click if you change your mind and do not want to update the CPL.
- You can view all CPLs that have been requested for this transaction whether active or void by clicking the **View CPL(s)** button. This will display the **CPL Window** dialog box.

Stewart Title Ins	urance Co	mpany: CPL W	indow		x
Action	Туре	Reference #	Status	Created Date	
View	Lender CPL	696059926	Void	3/18/2022 3:02:57 PM	
View	Buyer/Borrc	696055157	Active	3/18/2022 3:10:32 PM	
					ose

- You can view active CPLs by clicking on the *View* link.
- You cannot view an inactive or void CPL, therefore, the *View* link is disabled.
- Click Close to close the *CPL Window* dialog box and return to the *CPL* screen.

# **Requesting a Title Insurance Policy Jacket**

33

The *Jacket* tab contains the information and options available to request title insurance policy and commitment jackets.

• Click on the *Jacket* tab to display the policy jacket request screen.

CPL		Jack	æt	]	
Loan					
Loan Purpose: Purch	nase (	Closing Date	1/18/2022	Sales Price:	\$300,000.00
Loan Number: M-39	895839			Loan Amount:	\$250,000.00
Agency					
Name:	StewartAcce	ss Test Ageno	y		٧
Location:	StewartAcce	ss Test Ageno	ty Inc - 1980 Po	st Oak Suite 80	× 00
Jacket Options					
Property Type:	Residential -	General			~
Jacket F	Prior Policy			Simul	taneous Issue
Jacket Type: F	lease Select	a Policy Type			Ŷ
Jacket Form:	lease Select	a Jacket Form	n Type		~
Effective Date: 1	/18/2022	15			
Liability:		\$0.00			
Premium:		\$0.00	Remitt	tance:	\$0.00
				Endo	orsements
			View Ja	acket(s)	Get Jacket
Active Jacket(s)					
Policy N	umber	Туре	Sta	atus	Created Date

The *Name* field contains your company. If you have more than one company registered with Stewart Title and the one showing is not the correct company, click on the down arrow next to the *Name* field and select the correct company.

CPL			Jack	et		
Loan						
Loan Purpose: Pur	chase	Closing	Date	1/18/2022	Sales Pric	e: \$300,000.00
Loan Number: M-	39895839				Loan Amour	nt: \$250,000.00
Agency						· · ·
Name:	StewartAc	cess Test	Ageno	y		~
Location:	StewartAc	cess Test	Ageno	У		
Jacket Options						
Property Type:	Residentia	al - Genera	al			v
Jacket	Prior Policy	/			Sim Sim	ultaneous Issue
Jacket Type:	Please Sele	ct a Policy	у Туре			~
Jacket Form:	Please Sele	ct a Jacke	t Forn	n Type		Ŷ
Effective Date:	1/18/2022	15	]			
Liability:		\$0.00				
Premium:		\$0.00		Remi	ittance:	\$0.00
					En	dorsements
				View	Jacket(s)	Get Jacket
Active Jacket(s)						
Policy	Number		Туре	S	tatus	Created Date

The *Location* field defaults to the address associated with the company selection in the *Name* field. If your company has more than one location and the address shown is not the correct address, click on the down arrow v next to the *Location* field and select the correct address.

CPL			Jacke	et	]	
Loan						
Loan Purpose: Pur	chase	Closing	Date	1/18/2022	Sales Price	\$300,000.00
Loan Number: M-	39895839				Loan Amount	\$250,000.00
Agency						
Name:	StewartA	ccess Test	Agency	/		~
Location:	StewartA	ccess Test	Agency	/ Inc - 1980 Pc	ost Oak Suite 8	00 v
Jacket Options	StewartA	ccess Test	Agency	/ Inc - 1980 Pc	ost Oak Suite 8	00
Property Type:	SA Test A	gency wit	th 100 o	haracters in t	he Legal Nam	e 100 characters to
	StewartA	ccess Test	Agency	/ Inc - 788 W !	Sam Houston I	Pkwy N Suite 206
Jacket	Prior Polic	Cy .			Simu	Itaneous Issue
Jacket Type:	Please Se	ect a Polic	у Туре			~
Jacket Form:	Please Sel	ect a Jacke	et Form	Туре		~
Effective Date:	1/18/2022	15				
Liability:		\$0.00				
Premium:		\$0.00		Remit	tance:	\$0.00
					End	orsements
				View J	acket(s)	Get Jacket
Active Jacket(s)						
Policy N	lumber		Туре	Sta	itus	Created Date

• In the *Jacket Options* section, the *Property Type* field will default to the selection made in the closing file. However, if it is not correct, select the desired property type. Click on the down arrow next to the *Property Type* field and select the property type from the *Property Type* drop-down list.
CPL			Jacket							
Loan										
Loan Purpose: Pur	chase	Closing	Date 1,	/18/2022	Sales Price	\$300,000.00				
Loan Number: M-	39895839				Loan Amount	\$250,000.00				
Agency										
Name:	StewartA	ccess Test	Agency			~				
Location:	StewartA	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 *								
Jacket Options										
Property Type:	Resident	ial - Gener	al			U				
lacket	Resident	ial - Gener	al			e				
Jucket	Commer	cial - Gene	ral							
Jacket Type:	Please Se	lect a Polic	у Туре			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~				
Jacket Form:	Please Se	lect a Jacke	t Form 1	ype		~				
Effective Date:	1/18/2022	15	]							
Liability:		\$0.00								
Premium:		\$0.00		Remitt	ance:	\$0.00				
					End	orsements				
				View Ja	ecket(s)	Get Jacket				
Active Jacket(s)										
Policy	Number		Туре	Sta	atus	Created Date				

- On the *Jacket* tab, specify the jacket that you want to request.
- Click on the down arrow row for the *Jacket Type* field. The *Jacket Type* drop-down list will be displayed.

CPL			Jacket	t	]			
Loan								
Loan Purpose: Pur	rchase	Closing [	Date 1	/18/2022	Sales F	Price:	\$300,000.00	
Loan Number: M-	39895839				Loan Ame	ount:	\$250,000.00	
Agency								
Name	StewartAcc	ess Test A	Agency				٧	
Location:	StewartAcc	ess Test A	Agency	Inc - 1980 Po	ost Oak Su	ite 80	0 ~	
Jacket Options								
Property Type:	Residential	- Genera	l				~	
Jacket	Prior Policy				<u> </u>	Simulta	aneous Issue	
Jacket Type:	Please Selec	t a Policy	Туре				Ŷ	
Jacket Form:	Loan Commitmer	nt						
Effective Date:	Owners							
Liability:		\$0.00						
Premium:		\$0.00		Remit	tance:		\$0.00	
						Endor	rsements	
				View Ja	acket(s)		Get Jacket	
Active Jacket(s)								_
Policy I	Number	1	Туре	Sta	itus	C	reated Date	

- The selections for jacket type depend on the state the property is located in. In this example, you can request a commitment, loan or owners jacket.
- However, if the property is located in Colorado for instance, you can also request a guarantee.

Jacket	Prior Policy			Simultaneous Issue
Jacket Type:	Please Select a	Policy Type		~
Jacket Form:	Loan Commitment			
Effective Date:	Guarantee			
Liability:	Owners >	0.00		
Premium:	\$	0.00	Remittance:	\$0.00
				Endorsements
			View Jacket(s)	Get Jacket

38

• And in Texas, you can request a binder.

Jacket	Prior Policy			Simultaneous Issue
Jacket Type	Please Select a	Policy Type		~
Jacket Form	Loan Binder			
Effective Date	Commitment			
Liability	Owners	50.00		
Premium	: 1	\$0.00	Remittance:	\$0.00
				Endorsements
			View Jacket(s)	) Get Jacket

• Select the desired jacket by clicking on it.

CPL		Jacket			
Loan					
Loan Purpose: Purchase	Closing	Date 1/18	/2022	Sales Price	\$300,000.00
Loan Number: M-398958	39			Loan Amount:	\$250,000.00
Agency					
Name: Stew	artAccess Test	Agency			v
Location: Stew	artAccess Test	Agency Inc	- 1980 Po	st Oak Suite 8	° 00
Jacket Options					
Property Type: Resid	lential - Genera	al			v
Jacket Prior	Policy			Simul	taneous Issue
Jacket Type: Com	itment				>
Jacket Form: ALTA	Commitment 8	-1-2016 - F	L		~
Effective Date: 5/3/20	22 15	]			
Liability:	\$1,000.00				
Premium:	\$0.00		Remitt	ance:	\$0.00
				Ende	orsements
			View Ja	cket(s)	Get Jacket
Active Jacket(s)					
Policy Numbe	r	Туре	Stat	tus	Created Date

- Now select the jacket form that you want to request. If there is only one form associated with the jacket type selection, the *Jacket Form* field will default to that form. However, if there are multiple forms for the jacket type selected, select the jacket form that you want to request.
- Click on the down arrow if for the *Jacket Form* field. The *Jacket Form* drop-down list will be displayed.

CPL		Jacket			
Loan					
Loan Purpose: Pur	rchase C	losing Date 1/1	8/2022 Si	ales Price:	\$300,000.00
Loan Number: M-	39895839		Loan	Amount:	\$250,000.00
Agency					
Name	StewartAcces	ss Test Agency			٧
Location:	StewartAcces	ss Test Agency In	c - 1980 Post Oa	ak Suite 80	۰ v
Jacket Options					
Property Type:	Residential -	General			v
Jacket	Prior Policy			Simult	aneous Issue
Jacket Type:	Commitment				~
Jacket Form:	ALTA Commit	ment 8-1-2016 -	FL		Ŷ
Effective Date:	ALTA Commit	ment 8-1-2016 -	FL		
Liability:	\$1,0	00.00			
Premium:		\$0.00	Remittance	:	\$0.00
				Endo	rsements
			View Jacket	(S)	Get Jacket
Active Jacket(s)					
Policy I	Number	Туре	Status	(	Created Date

• Select the desired jacket form.

40

If a commitment is selected for the request, the *Effective Date* field will default to the current system (today's) date. It can be changed if necessary.

• To change the effective date, click in the *Effective Date* field and enter the desired date. You can also click on the calendar icon **iii** and select a date from the pop-up calendar.

CPL			Jacket						
Loan									
Loan Purpose: Pu	rchase	Closing E	Date 1/18/	2022	Sales Price:	\$300,000.00			
Loan Number: M	Loan Number: M-39895839 Loan Amount: \$250,000.00								
Agency									
Name	Stewart	Access Test A	gency			~			
Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 *									
Jacket Options									
Property Type: Residential - General *									
Jacket	Prior Pol	icy			Simul	taneous Issue			
Jacket Type:	Commitn	nent				~			
Jacket Form:	ALTA Cor	nmitment 8-	1-2016 - FL			~			
Effective Date:	5/3/2022	15		_					
Liability:	4	May 2022	•						
Premium:	Su Me	o Tu We Th	Fr Sa	Remitt	ance:	\$0.00			
	24 25	3 4 5	29 30 6 7		Endo	rsements			
	8 9	10 11 12	13 14						
	22 23	0 1/ 18 19 0 24 25 26	20 21 27 28	View Ja	icket(s)	Get Jacket			
Active Jacket(s)	29 30	31 1 2	3 4						
Policy	N			Sta	tus	Created Date			

If a commitment was selected and the property is in a state that does not charge for a commitment, the *Liability* field will default to \$1000 and the *Premium* and *Remittance* fields will default to \$0.00. All three fields will be disabled and cannot be changed.

However, if the property is in a state that charges for a commitment, the *Liability* field will still default to \$1000 but it will be active and can be changed to the desired liability amount. The *Premium* and *Remittance* fields will also be active so that you can enter the premium amount being charged for the commitment as well as the associated remittance or underwriter fee.

**Note:** Depending on the size of the integration screen and your monitor's resolution, you may have to scroll down to see all of the items pertaining to the jacket selection.

Endorsement do not apply to the commitment so if a commitment is being requested, the *Endorsements* button will be disabled.

If a commitment is being requested, no other options apply. You can now request the commitment.

• Click on the Get Jacket button.

42

• The jacket requested, in this case a commitment, will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the *Digital Files Folder Path* field of the *Digital Files Access* setting under <u>Settings</u>. It will also be shown in the *Active Jacket(s)* list.

C	PL			Jacket					
Loan									
Loan Purpos	e: Pu	rchase	Closing	Date 1/18/2	2022	Sales Pr	rice:	\$300,000.00	
Loan Numbe	n: M-	39895839				Loan Amo	unt:	\$250,000.00	
Agency									
	Name	Stewart/	Access Test	Agency				٣	
Lo	cation	Stewart/	Access Test	Agency Inc -	1980 P	ost Oak Suit	e 80	0 °	
Jacket Option	s								
Property	y Type	Resident	tial - Gener	al				v	
Jacket		Prior Poli	cy			🗌 Si	mult	aneous Issue	
Jacket	Type:	Please Se	lect a Polic	у Туре				v	
Jacket F	Jacket Form: Please Select a Jacket Form Type *								
Effective	Date:	5/3/2022	15	]					
Lia	bility:		\$1,000,00	1					
Bron			\$0.00		Domit	+200C01		\$0.00	
Field	nium;		\$0.00		Nerrin	lance:		\$0.00	
						E	indo	rsements	
					View J	acket(s)		Get Jacket	
Active Jacket	(s) —						<u>Dista</u>		
	Policy	Number		Туре	St	atus	(	Created Date	
Options	C-	0000-7245	27892	Commitme	ent	Active		5/3/2022	

• You can request policy jackets separately if you wish. However, if you are issuing both a loan and owner's policy for the transaction, you can request both jackets at the same time by clicking the *Simultaneous Issue* check box.

	CPL		Jacket				
Loan							
Loan Purpo	se: Purchase	Closi	ng Date 1/	18/2022	Sales Pr	rice: \$300,000.00	
Loan Numb	er: M-398958	339			Loan Amo	unt: \$250,000.00	
Agency							
	Name: Stew	artAccess Te	est Agency			v	
Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 *							
Jacket Optio	ns						
Proper	ty Type: Resid	dential - Ger	neral			-	
Loan Polic	y Owner	s Policy	Prior Polic	у	✓ Si	multaneous Issue	
Jacke	t Type: Loan					~	
Jacket	Form: ALTA	Loan Policy	- FL - 6-17-2	006		~	
Effectiv	e Date: 1/18/2	2022 1	5				
	ability	\$250,000					
-		\$250,000.	20	-		47.50	
Pre	emium:	\$25.0	00	Rem	ittance:	\$7.50	
					E	Indorsements	
Addl.	Charge	Sp	pecial Charg	e	Forr	n Fields	
Remove Ad	ditional Charge	Type		Add	itional Fee		
				View	Jacket(s)	Get Jacket	
Active Jack	et(s)						
	Policy Numb	er	Туре	2	Status	Created Date	
	1		6		Arthur	E (2 (2022)	

- This will produce a second policy tab to enable you to select both policies for the request. The *Loan Policy* tab is for selecting the loan policy.
- The *Jacket Type* field defaults to *Loan*. There is no other selection.
- Select the loan policy that you would like to request by clicking on the down arrow for the *Jacket Form* field. The *Jacket Form* drop-down list will be displayed.

			Jacket		CPL
_					Loan
	ice: \$300,000.00	2 Sales Pric	Date 1/18/202	nase Closing	Loan Purpose: Purc
	int: \$250,000.00	Loan Amour		895839	Loan Number: M-3
$\sim$					Agency
	v		Agency	StewartAccess Test	Name:
	e 800 🔹 👻	80 Post Oak Suite	Agency Inc - 19	StewartAccess Test	Location:
					Jacket Options
	v		ral	Residential - Gener	Property Type:
	nultaneous Issue	Loan Policy O			
	Ŷ			oan	Jacket Type:
	~	LTA Loan Policy - F	Jacket Form: 🖌		
	2006	olicy - FL - 6-17-20	sidential Loan Po	LTA Short Form Re	Effective Date:
			FL - 6-17-2006	LTA Loan Policy - F	
2014 -	cation Policy 12-1-	Mortgage Modifica	nited Coverage N	LTA Residential Lin	Liability:
	\$7.50	Remittance:	) F	\$25.00	Premium:
	ndorsements	En			
	n Fields	Form	cial Charge	Spec	Addl. Charge
	n Fields	Form	cial Charge	Spec	Addl. Charge
	n Fields	Form Additional Fee	cial Charge	Spectra	Addl. Charge Remove Additional C
~	n Fields	Form Additional Fee	cial Charge	Spec	Addl. Charge Remove Additional C
Ň	Get Jacket	Form Additional Fee	cial Charge	Spec	Addl. Charge Remove Additional C
Ĭ	Get Jacket	Form Additional Fee iew Jacket(s)	cial Charge	Spec	Addl. Charge Remove Additional C
, ,	Get Jacket	Additional Fee iew Jacket(s) Status	Cial Charge	Spectra	Addl. Charge Remove Additional C Active Jacket(s) Policy N

• Click on the desired loan policy to select it.

CPL			Jacket		]		
Loan							
Loan Purpose: Pure	chase	Closing	Date 1/18/2	2022	Sales Pri	ce: \$300,000.00	
Loan Number: M-3	39895839				Loan Amou	nt: \$250,000.00	
Agency							
Name:	StewartAc	cess Test	Agency			~	
Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ×							
Jacket Options							
Property Type:	Residentia	il - Gener	al			v	
Loan Policy (	Owners Poli	cy P	rior Policy		✓ Sin	nultaneous Issue	
Jacket Type:	Loan					ÿ	
Jacket Form:	ALTA Loan	Policy - Fl	L - 6-17-2006			~	
Effective Date:	1/18/2022	4 5	]				
	.,	12					
Liability:	\$25	0,000.00					
Premium:		\$25.00		Remit	ance:	\$7.50	
					Er	ndorsements	
Addl. Charge		Spec	ial Charge		Form	Fields	
Additional (	Change True			Addition	anal Eas		
Additional C	unarge Type	:		Additi	onal ree		
				View Ja	acket(s)	Get Jacket	
Active lacket(s)					1	Created Data	
Active Jacket(s) Policy I	Number		Type	Sta	itus	Created Date	

- The *Liability*, *Premium* and *Remittance* fields will be populated automatically with the appropriate information from the closing file and cannot be changed.
- If an effective date has been entered in the closing file for the policy type selected, that date will automatically populate the *Effective Date* field. Otherwise it will be populated with the closing or settlement date that was entered in the closing file. The date can be changed if necessary.
- To change the effective date, click in the *Effective Date* field and enter the desired date. You can also click on the calendar icon **iii** and select a date from the pop-up calendar.

CPL		Jacket			
Loan					
Loan Purpose: Purcha	ase Closing	Date 1/18/20	22 Sa	ales Price:	\$300,000.00
Loan Number: M-398	895839		Loan	Amount:	\$250,000.00
Agency					^
Name: S	StewartAccess Test /	Agency			~
Location: S	StewartAccess Test /	Agency Inc - 19	980 Post Oa	ak Suite 80	۰ ۷
Jacket Options					
Property Type:	Residential - Genera	al			v
Loan Policy Ow	vners Policy P	rior Policy		✓ Simult	aneous Issue
Jacket Type: Lo	oan				~
Jacket Form: Al	LTA Loan Policy - FL	- 6-17-2006			Ŷ
Effective Date: 1/	/18/2022 15				
Liability:	<ul> <li>January 202</li> </ul>	22 🕨			
Premium:	Su Mo Tu We Th	n Fr Sa	Remittance		\$7.50
	26 27 28 29 30	31 1		Ende	
	9 10 11 12 13	3 14 15		Endo	rsements
Addl. Charge	16 17 18 19 20	21 22		Form Fie	lds
Remove Additional	23 24 25 20 27 30 31 1 2 3	4 5	Additional I	Fee	
					~
		N	/iew Jacket(	(S)	Get Jacket
Active Jacket(s)					
Policy Nu	umber	Туре	Status	(	Created Date
Options C-000	00-724527892	Commitment	t Act	ive	5/3/2022

At the bottom of the policy screen, there are several tabs. This section enables you to enter additional information or charges for the jacket request. Only the tabs that pertain to the jacket type being requested and/or the state the property is located in will be active.

Note: You will need to scroll down to view these tabs.

If the property is in a state or jurisdiction that allows for additional charges, the *Addl. Charge* tab will be active.

	CPL			Jac	ket		]		
Loan —			-						
Loan Pu	urpose:	Purchase	Closir	ng Date	1/18/2	2022	Sales P	rice:	\$300,000.00
Loan N	umber: I	M-39895839					Loan Amo	ount:	\$250,000.00
	Locatio	on: Stewart/	Access Te	st Agen	cy Inc -	1980 Pc	ost Oak Sui	ite 80	0 ×
Jacket O	ptions								
Pro	operty Ty	pe: Resident	tial - Gen	eral					~
Loan	Policy	Owners Po	olicy	Prior P	olicy		<b>√</b> S	imult	aneous Issue
Ja	acket Typ	e: Loan							~
Ja	cket Forn	n: ALTA Loa	n Policy -	FL - 6-	17-2006				~
Effe	ctive Dat	e: 1/18/202	2 1	5					
	Liabilit	y: S	250,000.0	00					
	Premiun	n	\$25.0	00		Remit	tance:		\$7.50
	i reman		2230			- ALTING			\$7150
								Endo	rsements
A	ddl. Char	ge	Sp	ecial Ch	arge		For	m Fie	lds
Remove	Addition	nal Charge Ty	pe			Additi	onal Fee		
	Curchar				v		0.00	٨	d Charge
	Surcharg	Je					0.00	AO	
						View Ja	acket(s)		Get Jacket
Active J	lacket(s)								
	Pol	icy Number		Туре	2	Sta	atus	(	Created Date
Optic	ons	C-0000-7245	527892	Cor	nmitme	ent	Active		5/3/2022

• To add an additional charge, click on the down arrow 🔽 for the charge descriptions drop-down list and select the desired charge.

A	ddl. Charge	Special Charge	Fo	rm Fields	
Remove	Additional Charge T	ype	Additional Fee		
	Surcharge	~	0.00	Add Charge	~
	Surcharge		View lacket(s)	Get lacket	
			view Jacket(s)	Gerbacker	

• Enter the amount of the charge.

А	ddl. Charge	Special Charge	Fo	rm Fields	
Remove	Additional Charge 1	ype	Additional Fee		
	Surcharge	Ŷ	150.00	Add Charge	$\sim$
			View Jacket(s)	Get Jacket	

• Click on the Add Charge button. The charge will be added to the additional charge list.

Addl. Charge	Special Charge	Fo	rm Fields
Remove Additional Charge	туре	Additional Fee	
Remove Surcharge		150.00	
	×	0.00	Add Charge 🗸 🗸
		View Jacket(s)	Get Jacket

- Multiple charges can be entered. Repeat this process to add more charges.
- If you need to remove a charge, click on the Remove button. It will be removed from the list.

If the property is in a state that allows for special charges, the *Special Charge* tab will be active.

Add	I. Charge	Speci	Special Charge Form Fields		rm Fields	
Remove	Trans Code		Actual Premi	Actual Remit		
		~	0.00	0.00	Add Charge	~
			V	/iew Jacket(s)	Get Jacket	

• To add a special charge, click on the down arrow right for the charge descriptions dropdown list and select the desired charge.

Ado	dl. Charge	Speci	ial Charge	For	rm Fields	
Remove	Trans Code		Actual Premi Actual Remit			
		×	0.00	0.00	Add Charge	
	(8042)Commitm (8041)Commitm (0050)Credit for (0020)Foreclosu	nent Issued t nent to Texas r Commitmer ire Credit.	o F.D.I.C. and C Department on t Premium	0.T.S.Commitme f Transportatior	nt to Highway De	partment

• Enter the premium for the charge in the *Actual Premium* field and the underwriter fee or remittance in the *Actual Remittance* field.

Add	ll. Charge	Speci	al Charge	Fo	rm Fields	
Remove	Trans Code		Actual Premi	Actual Remit		
	(8041)Commitm	nent to 🐂	100.00	30.00	Add Charge	~
			V	iew Jacket(s)	Get Jacket	

• Click on the Add Charge button. The charge will be added to the special charge list.

Addl.	Charge	Specia	al Charge	Fo	orm Fields	
Remove	Trans Code		Actual Premi	Actual Remit		
Remove	(8041)Commit	ment to Texa:	100.00	30.00		
		~	0.00	0.00	Add Charge	~
			V	iew Jacket(s)	Get Jacket	

• Multiple charges can be entered. Repeat this process to add more charges.

**49** 

• If you need to remove a charge, click on the Remove button. It will be removed from the list.

If you are requesting a short form loan policy jacket, the *Form Fields* tab will become active. This will give you the opportunity to enter information needed for the short form policy.

Addl. Charge	Special Charge	Form Fields
Please select additional option	ns for selected policy form	
Addendum Attached	[	<b>v</b>
Mortgage Amount		250000.00
Mortgage Date		1/18/2022
State Statutes		
Premium (for Sch A only)	ka	
Policy Time Stamp	Γ	
Borrower Names and Vesting		James Johnson and Sara Johnson
	V	/iew Jacket(s) Get Jacket

• Information that is available in the closing file will be populated automatically. Other information will need to be entered manually. Enter all information necessary for the short form loan policy.

Note: The form fields that are presented will depend on the state that the property is located in.

• To select the owner's policy jacket, click on the *Owners Policy* tab.

CPL	Jacket			
Loan				
Loan Purpose: Purchase	Closing Date 1/	18/2022	Sales Price:	\$300,000.00
Loan Number: M-39895839	)		Loan Amount:	\$250,000.00
Agency				~
Name: Stewart	Access Test Agency			٧
Location: Stewart	Access Test Agency I	nc - 1980 Po	st Oak Suite 80	× 00
Jacket Options				
Property Type: Resider	ntial - General			v
Loan Policy Owners P	olicy Prior Polic	У	<ul> <li>Simult</li> </ul>	taneous Issue
Jacket Type: Owners				~
Jacket Form: ALTA Ow	ners Policy - FL - 6-1	7-2006		~
Effective Date: 1/18/202	2 15			
Liability:	300,000.00			
Premium:	\$1,330.00	Remitt	tance:	\$399.00
			Endo	orsements
Addl. Charge	Special Charg	e	Form Fie	elds
-	-,,			
Remove Additional Charge Iy	/pe	Additio	onal Fee	
		View Ja	acket(s)	Get Jacket
Active Jacket(s)				
Policy Number	Type	Sta	atus	Created Date
Options C-0000-724	527892 Comm	itment	Active	5/3/2022
			I	

- The *Jacket Type* defaults to *Owners*. There is no other selection.
- Select the owner's policy that you would like to request by clicking on the down arrow
   for the *Jacket Form* field. The *Jacket Form* drop-down list will be displayed.

CPL		Jacket		
Loan				
Loan Purpose: Pu	rchase Clo	osing Date 1/18/2	2022 Sal	es Price: \$300,000.00
Loan Number: M-	39895839		Loan /	Amount: \$250,000.00
Agency				
Name	StewartAccess	Test Agency		Υ
Location	StewartAccess	Test Agency Inc -	1980 Post Oak	: Suite 800 🛛 👻
Jacket Options				
Property Type	Residential - O	Seneral		v
Loan Policy	Owners Policy	Prior Policy		Simultaneous Issue
Jacket Type:	Owners			~
Jacket Form:	ALTA Owners P	olicy - FL - 6-17-20	006	~
Effective Date:	ALTA Owners P	olicy - FL - 6-17-2	006	
Encerve buter	ALTA U. S. Polic	y 12-3-2012		
Liability:	\$300,00	00.00		
Premium:	\$1,33	30.00	Remittance:	\$399.00
				Endorsements
Addl. Charge		Special Charge		Form Fields
Hadin Charge		Special charge		Torriticius
Remove Additional	Charge Type		Additional Fe	e
			View Jacket(s	) Get Jacket
Active Jacket(s)				
Policy	Number	Туре	Status	Created Date
		C		E (2, (2022)

• Click on the desired owner's policy to select it.

	CPL			Jacket		]	
Loan							
Loan Pu	irpose:	Purchase	Closing	Date 1/18/2	022	Sales Pri	ce: \$300,000.00
Loan N	umber:	M-39895839				Loan Amou	nt: \$250,000.00
Agency							1
	Na	me: Stewart	Access Test	Agency			*
	Locat	ion: Stewart	Access Test	Agency Inc -	1980 Po	st Oak Suite	800 *
Jacket O	ptions –						
Pro	operty Ty	/pe: Residen	tial - Genera	al			v
Loan F	Policy	Owners Po	plicy P	rior Policy	1	✓ Sin	nultaneous Issue
Ja	acket Typ	e: Owners					v
Ja	cket For	m: ALTA Ow	ners Policy -	- FL - 6-17-20	06		v
Effe	ctive Da	te: 1/18/202	2 15	1			
	1 Calabi			]			
	Liabili	ty: S	300,000.00				
	Premiu	m:	\$1,330.00		Remit	tance:	\$399.00
						Er	ndorsements
A	ddl. Cha	rge	Spec	ial Charge		Form	Fields
Remove	Additio	nal Charge Tv	pe		Additi	onal Fee	
					View Ja	acket(s)	Get Jacket
- Active J	acket(s)						
	Po	licy Number		Туре	Sta	atus	Created Date
					1		

- The *Liability*, *Premium* and *Remittance* fields will be populated automatically with the appropriate information from the closing file and cannot be changed.
- If an effective date has been entered in the closing file for the policy type selected, that date will automatically populate the *Effective Date* field. Otherwise it will be populated with the closing or settlement date that was entered in the closing file. The date can be changed if necessary.
- To change the effective date, click in the *Effective Date* field and enter the desired date. You can also click on the calendar icon **15** and select a date from the pop-up calendar.
- As with the loan policy, the same tabs are available for the owner's policy to enter additional or special charges. Enter any additional or special charges that may apply to the owner's policy request.

**Note:** Form fields do not apply to an owner's policy and therefore the *Form Fields* tab will never be active for an owner's policy jacket request.

If you are requesting a loan or owners policy jacket, the *Endorsements* button will be active so that you can review and/or select endorsements to be submitted with the jacket request.

• Click on the Endorsements button. The Endorsements and Other Options dialog box will be displayed.

Endorsem	ents				
Select	Endorsement Name	Effective Date	Premium	Remittance	
~	ALTA 8.1 Environmental Protection	1/18/2022	5 25.00	7.50	
~	ALTA 5.0 PUD Endorsement	1/18/2022	5 25.00	7.50	
		~ 1/18/2022 1	j 0.00	0.00	Add Endorsement

If you are using the *Simultaneous Issue* function to request both the loan and owner's policy together, you will see tabs for both policies. If you are requesting the policies separately, you will only see the endorsements for the policy jacket that you are requesting.

If endorsements were entered in the closing file, they will be shown here and automatically selected as indicated by a check mark in the *Select* column for each endorsement. If these are the endorsements that you want to send with the request, then nothing needs to be done. You can simply close this dialog box and proceed to requesting the jacket.

However, you have the opportunity to modify, delete or add an endorsement if necessary.

- If you do not want to include a particular endorsement in the request, uncheck the check box in the *Select* column for the endorsement that you want to remove.
- If you need to modify an endorsement, click in the field that you want to change and enter the desired information. The effective date, premium and remittance can all be changed.

• If you need to add an endorsement, click on the down arrow 🔽 for the endorsements drop-down list. The available endorsements for the policy being requested will be displayed.

Loan Policy       Owner's Policy         Endorsements       Effective Date       Premium       Remittance         Image: Select       Endorsement Name       Effective Date       Premium       Remittance         Image: ALTA 8.1 Environmental Protection       1/18/2022       15       25.00       7.50         Image: ALTA 5.0 PUD Endorsement       1/18/2022       15       25.00       7.50		
Endorsements         Select       Endorsement Name       Effective Date       Premium       Remittance         Image: ALTA 8.1 Environmental Protection       1/18/2022       15       25.00       7.50         Image: ALTA 5.0 PUD Endorsement       1/18/2022       15       25.00       7.50		
Endorsements       Effective Date       Premium       Remittance         Image: Constraint of the second se		
Select       Endorsement Name       Effective Date       Premium       Remittance         Image: ALTA 8.1 Environmental Protection       1/18/2022       15       25.00       7.50         Image: ALTA 5.0 PUD Endorsement       1/18/2022       15       25.00       7.50		
Image: ALTA 8.1 Environmental Protection         1/18/2022         15         25.00         7.50           Image: ALTA 5.0 PUD Endorsement         1/18/2022         15         25.00         7.50		
ALTA 5.0 PUD Endorsement         1/18/2022         15         25.00         7.50		
✓ 1/18/2022 15 0.00 0.00 Add Endorsement		
ALTA 14-06 Future Advance - Priority - FL - Rev 12-1-2013	_	
ALTA 5.1-06 Planned Unit Development - FL - Rev 6-17-2006		
ALTA 8.1-06 Environmental Protection Lien - FL - 6-17-2006		
ALTA 9-06 Restrictions, Encroachments, Minerals - FL - 12-1-2013 Close		
ALTA 10-06 Assignment - FL - Rev 12-1-2013		
ALTA 11-06 Mortgage Modification - FL - Rev 6-17-2006		
ALTA 12-06 Aggregation - FL - Rev 4-2-2013		
ALTA 13.1-06 Leasehold - Loan - FL - Rev 6-17-2006		
ALTA 14.2-06 Future Advance - Letter of Credit - FL - Rev 12-1-2013		
ALTA 14.3-06 Future Advance - Reverse Mortgage - FL - Rev 12-1-2013		
ALTA 23.1-06 Co-Insurance - Multiple Policies FL Rev 8-1-2017		 
ALTA 4.1-06 Condominium - FL - FK 6-17-2006		
ALTA 5,1-06 Planned Unit Development - FL - Rev 6-1-1987		
ALTA 6-06 Variable Rate Mortgage - FL - Rev 6-17-2006		
ALTA 6.2-06 Variable Rate Mortagge - Negative Amort - FL - Rev 6-17-2006		
ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6-17-2006		
ALTA 9.3-06 Restrictions, Encroachments, Minerals - FL - 6-17-06		
FL Additional Interest		

- Select the desired endorsement by clicking on it.
- Enter the effective date, premium and remittance for the endorsement in the appropriate fields.
- Click the Add Endorsement button to add the endorsement. It will be displayed in the list and automatically selected.

Select	Endorsement Name	Effective Date		Premium	Remittance	
$\checkmark$	ALTA 8.1 Environmental Protection	1/18/2022	15	25.00	7.50	
<b>~</b>	ALTA 5.0 PUD Endorsement	1/18/2022	15	25.00	7.50	
✓	ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6	1/18/2022	15	100.00	30.00	
	ALTA 7-06 Manufacturing Housing Unit - FL - R 🗸	1/18/2022	15	100.00	30.00	Add Endorsement
					Close	

• If you are using the simultaneous issue function and you have a tab for the owner's policy, click on the *Owner's Policy* tab and review the endorsements for the owner's policy jacket request. As with the loan policy, you can modify, delete or add endorsements.

Loan Policy	Owner's Policy				
Endorseme	ents				
Select	Endorsement Name	Effective Date	Premium	Remittance	
~	ALTA 9.1 Endorsement	1/18/2022	135.50	40.65	
~	ALTA 5.1 PUD Endorsement	1/18/2022 11	25.00	7.50	
		× 5/4/2022 15	0.00	0.00	Add Endorsement
		× 5/4/2022 15	0.00	0.00	Add Endorsement
		v 5/4/2022 15	0.00	0.00 Close	Add Endorsement
		v 5/4/2022 15	0.00	0.00 Close	Add Endorsement

• Click

56

Close

to close the *Endorsements and Other Options* dialog box.

If you are requesting a loan or owner policy jacket and a reissue credit is being given for the new policy being issued, you can search Stewart Title's system to see if a prior policy had previously been issued through the Stewart Title underwriter service.

CPL			Jacket			
oan						
Loan Purpose:	Purchase	Closing [	Date 1/18/	/2022	Sales Price	: \$300,000.00
Loan Number:	M-39895839				Loan Amoun	t: \$250,000.00
gency						
Na	ame: Stewart	Access Test A	Igency			٧
Locat	tion: Stewart	Access Test A	gency Inc	- 1980 Po	st Oak Suite 8	800 ~
acket Options -						
Property T	ype: Residen	tial - Genera	l -			v
Jacket	Prior Pol	icy			Simu	Itaneous Issue
Driginal Jacket						
File Number:						Search
Original Jacket					¥	Clear
OPN:			Liabil	ity:		Toggle
Effective Date:	Select a date	15				
			[	View Ja	acket(s)	Get Jacket
Active Jacket(s)						
Po	olicy Number		Туре	Sta	itus	Created Date

• To do so, click on the *Prior Policy* tab.

• In the *Original Jacket* section, enter the *Landtech* filename or number associated with the prior policy jacket.

CPL			Jacket			
Loan						
Loan Purpose:	Purchase	Closing I	Date 1/18/	2022	Sales Price	: \$300,000.00
Loan Number:	M-39895839				Loan Amoun	t: \$250,000.00
Agency						
Na	me: Stewart/	Access Test A	Agency			~
Locat	ion: Stewart/	Access Test A	Agency Inc -	- 1980 Po	st Oak Suite 8	B00 Y
Jacket Options						
Property Ty	/pe: Resident	tial - Genera	il			v
Jacket	Prior Poli	cy			Simu	ultaneous Issue
Original Jacket	_					
File Number:	20210121					Search
Original Jacket					~	Clear
OPN:			Liabili	ity:		Toggle
Effective Date:	Select a date	15				
				View Ja	ecket(s)	Get Jacket
Active Jacket(s)						
Po	licy Number		Туре	Sta	itus	Created Date

- Click the Search button. The results will be displayed in the *Original Jacket* drop-down list.
- Click on the down arrow refer to the *Original Jacket* field. The *Original Jacket* dropdown list will be displayed.

CPL		Ja	ocket		
Loan		-			
Loan Purpose:	Purchase	Closing Dat	e 1/18/2022	Sales Price	\$300,000.00
Loan Number:	M-39895839			Loan Amount	\$250,000.00
Agency					· · · ·
Na	me: Stewart/	Access Test Age	ncy		~
Locat	tion: Stewart/	Access Test Age	ncy Inc - 1980 P	ost Oak Suite 8	۷ 00
Jacket Options -					
Property Ty	ype: Resident	tial - General			~
Jacket	Prior Poli	cy		Simu	Itaneous Issue
Original Jacket	_				
File Number:	20210121				Search
Original Jacket	[			~	Clear
OPN:	Loan-M-000	)-661707441-A	LTA Loan Policy -	FL - 6-17-200	6 e
Effective Date:	Owners-O-00	000-661054261	-ALTA Owners Po	olicy - FL - 6-17	-2006
	Selectionate				v
			View J	acket(s)	Get Jacket
Active Jacket(s)					
Po	licy Number	Ту	pe St	atus	Created Date

• Select the desired prior policy jacket. The information for that policy jacket will populate the associated fields.

CPL	Jacket	
Loan		
Loan Purpose: Purchase	Closing Date 1/18/2022	Sales Price: \$300,000.00
Loan Number: M-39895839		Loan Amount: \$250,000.00
Agency		
Name: Stewart	Access Test Agency	v
Location: Stewart	Access Test Agency Inc - 1980 F	Post Oak Suite 800 🔹 👻
Jacket Options		
Property Type: Residen	tial - General	v
Jacket Prior Pol	icy	Simultaneous Issue
Original Jacket		
File Number: 20210121		Search
Original Jacket Owners-O-0	000-661054261-ALTA Owners F	Policy - I Y Clear
OPN: 6	61054261 Liability:	\$250,000.00 Toggle
Effective Date: 12/1/2021	15	
	View	Jacket(s) Get Jacket
Active Jacket(s)		
Policy Number	Type S	itatus Created Date

This prior policy information will be submitted with the jacket request as proof of a prior policy for the reissue credit.

• You can clear your selection if necessary by clicking the Clear button.

If the prior policy jacket does not exist in the Stewart system, but you entered prior policy information in the *Landtech* closing file, you can use that prior policy information.

• Click on the Toggle button.

Loan Loan Purpose: Purchase Closing Date 1/18/2022 Sales Price: \$300,000,0 Loan Number: M-39895839 Loan Amount: \$250,000,0 Agency Name: StewartAccess Test Agency v Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 v Jacket Options Property Type: Residential - General v Jacket Prior Policy Simultaneous Issue Original Jacket File Number: Search Original Jacket File Number: Search Original Jacket File Number: O-2882948534 Liability: \$350,000,00 Toggle Effective Date: 6/20/2009 15 (Owners)	0.0		j.	acket		
Loan Purpose:       Purchase       Closing Date 1/18/2022       Sales Price:       \$300,000.0         Loan Number:       M-39895839       Loan Amount:       \$250,000.0         Agency       Name:       StewartAccess Test Agency       v         Location:       StewartAccess Test Agency Inc - 1980 Post Oak Suite 800       v         Jacket Options       Property Type:       Residential - General       v         Jacket       Prior Policy       Simultaneous Issu         Original Jacket       Search       Original Jacket         File Number:       Search       Clear         OPN:       O-2882948534       Liability:       \$350,000.00         Effective Date:       6/20/2009       15       (Owners)	oan		-			
Loan Number: M-39895839 Loan Amount: \$250,000.0 Agency Name: StewartAccess Test Agency Location: StewartAccess Test Agency // Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 // Jacket Options Property Type: Residential - General // Jacket Prior Policy Simultaneous Issu Original Jacket File Number: Search Original Jacket File Number: Search Original Jacket Effective Date: 6/20/2009 15 (Owners) View Jacket(s) Get Jacket	Loan Purpose:	Purchase	Closing Dat	te 1/18/2022	Sales Price:	\$300,000.00
Agency Name: StewartAccess Test Agency Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 Jacket Options Property Type: Residential - General Jacket Prior Policy Original Jacket File Number: Original Jacket Original Jacket Original Jacket Effective Date: 6/20/2009 15 (Owners) View Jacket(s) Get Jacket	Loan Number:	M-39895839			Loan Amount:	\$250,000.00
Name:       StewartAccess Test Agency       v         Location:       StewartAccess Test Agency Inc - 1980 Post Oak Suite 800       v         Jacket Options       Property Type:       Residential - General       v         Jacket       Prior Policy       Simultaneous Issu         Original Jacket       Search         Original Jacket       View Jacket       Clear         OPN:       O-2882948534       Liability:       \$350,000,00         Effective Date:       6/20/2009       15       (Owners)	Agency					
Location:       StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 v         Jacket Options       Property Type:         Property Type:       Residential - General v         Jacket       Prior Policy         Original Jacket       Simultaneous Issue         Original Jacket       Search         Original Jacket       View Jacket         Prior Policy       Search         Original Jacket       View Jacket         OPN:       O-2882948534       Liability:         \$350,000.00       Toggle         Effective Date:       6/20/2009         View Jacket(s)       Get Jacket	Na	me: Stewart/	Access Test Age	ency		٧
Jacket Options Property Type: Residential - General  Jacket Prior Policy Simultaneous Issue Original Jacket File Number: Original Jacket Original Jacket Original Jacket Original Jacket OPN: O-2882948534 Liability: \$350,000.00 Toggle Effective Date: 6/20/2009 15 (Owners) View Jacket(s) Get Jacket	Locat	ion: Stewart/	Access Test Age	ency Inc - 1980	Post Oak Suite 80	× 00
Property Type:       Residential - General          Jacket       Prior Policy       Simultaneous Issu         Original Jacket       Search         Original Jacket       Search         Original Jacket       Clear         OPN:       O-2882948534       Liability: \$350,000.00         Effective Date:       6/20/2009       (Owners)         View Jacket(s)       Get Jacket	lacket Options					
Jacket     Prior Policy     Simultaneous Issue       Original Jacket	Property Ty	/pe: Residen	tial - General			~
Original Jacket File Number: Search Original Jacket OPN: O-2882948534 Effective Date: 6/20/2009 15 (Owners) View Jacket(s) Get Jacket	Jacket	Prior Pol	icy		Simul	taneous Issue
File Number:     Search       Original Jacket     V       OPN:     O-2882948534       Liability:     \$350,000.00       Toggle     (Owners)	Original Jacket					
Original Jacket V Clear OPN: O-2882948534 Liability: \$350,000.00 Toggle Effective Date: 6/20/2009 15 (Owners) View Jacket(s) Get Jacket	File Number:					Search
OPN:         O-2882948534         Liability:         \$350,000.00         Toggle           Effective Date:         6/20/2009         15         (Owners)	Original Jacket				~	Clear
Effective Date: 6/20/2009 15 (Owners) View Jacket(s) Get Jacket	OPN:	O-28	82948534	Liability:	\$350,000.00	Toggle
View Jacket(s) Get Jacket	Effective Date:	6/20/2009	15		(Own	ers)
				View	Jacket(s)	Get Jacket
Active Jacket(s)	Active Jacket(s)					
Policy Number Type Status Created Date	Po	licy Number	Ту	pe :	Status	Created Date

The policy number, liability and effective date will be displayed with an indicator as to what type of policy it is. The owner's policy is presented by default.

• If there is prior loan policy and you would like to select that, click on the **Toggle** button again and the loan policy information will be displayed.

If you are using the simultaneous issue function to request the loan and owner's policy jackets together, there will be an additional check box labeled *Apply to Owners*.

Loan Purpose: F Loan Number: P Agency Nan Locatio	Purchase Closin M-39895839 ne: StewartAccess Tes	g Date 1/18/2022	Sales Pric	e: \$300,000.00 ht: \$250,000.00
Loan Purpose: F Loan Number: M Agency Nam Locatio	Purchase Closin M-39895839 ne: StewartAccess Tes	g Date 1/18/2022	Sales Pric	e: \$300,000.00 nt: \$250,000.00
Loan Number: Magency Nam Locatio	N-39895839	t Agency	Loan Amour	nt: \$250,000.00
Agency Nam Locatio	1e: StewartAccess Tes	t Agency		
Nan Locatio	ne: StewartAccess Tes	t Agency		
Locatio		er igeney		٣
	on: StewartAccess Tes	t Agency Inc - 198	0 Post Oak Suite	800
Jacket Options				
Property Typ	e: Residential - Gene	eral		÷
Loan Policy	Owners Policy	Prior Policy	✓ Sim	ultaneous Issue
Original Jacket				
File Number:		]		Search
Original Jacket			~	Clear
OPN:	O-2882948534	Liability:	\$350,000.00	Toggle
Effective Date:	6/20/2009 15	Apply to Ow	vners (Ov	vners)
		Vīe	w Jacket(s)	Get Jacket
Active Jacket(s) -				
Poli	cy Number	Туре	Status	Created Date
Options	C-0000-724527892	Commitment	Active	5/3/2022

- This enables you to specify which policy is receiving the reissue credit. If it is the owner's policy, check the *Apply to Owners* check box. If it is the loan policy, leave the check box blank.
- You are now ready to request the jacket or jackets. Click on the Get Jacket button.

If you had entered endorsements in the closing file but did not review them prior to the jacket request, you will see this message.



This message is warning you that you have endorsements entered in the closing file but you did not review them prior to the jacket request. You can proceed if you want but be aware that the endorsements will not be submitted with the jacket request.

- Click <u>Yes</u> if you want to proceed with the jacket request without submitting any endorsements.
- Click No if you want to review or add additional endorsements prior to sending the jacket request. The *Endorsements and Other Options* dialog box will be displayed.

ENDORSEM	ents an	D OTHER OPTIONS					_	<
	an Policy	Owner's Policy						
		owner's rolley						
	Endorseme	nts						
	Select	Endorsement Name	Effective Date	Premium	Remittance			
	✓	ALTA 8.1 Environmental Protection	1/18/2022	25.00	7.50			
	~	ALTA 5.0 PUD Endorsement	1/18/2022 15	25.00	7.50			
					· · · · · ·			
L			~ 1/18/2022 <b>15</b>	0.00	0.00	Add Endorsement		
				· · · ·			_	
					Close			

- After you have reviewed the endorsements, click the **Close** button to close the **Endorsements and Other Options** dialog box.
- Then click the Get Jacket button again.

If an endorsement that is being submitted does not match any of the endorsements in the Stewart system, you will see a dialog box requesting user input.

USER INPUT REC	QUIRED			_	
	Additional information is needed. Please select answers to the following questions and re-submit your order.				
	Questions				
	ALTA 9.1-06 Restrictions, Encroachments, Minerals - FL - Rev 12-1-2013	91-Form 9.1	v		
		Submit	Cancel		

The endorsement that is being submitted that does not match will be displayed along with a dropdown list of endorsements that are in the Stewart system. You will need to select the endorsement that is the best match for the endorsement that you are submitting.

• Click on the down arrow 🔽 for the endorsement selections to display the available endorsements.

USER INPUT REQUIRED		_   =   ×
Additional information is needed. Please select answers to the following questions and re-submit your order.		
Questions		
ALTA 9.1-06 Restrictions, Encroachments, Minerals - FL - Rev 12-1-2013	01_Enrm 0.1	
	91-Form 9.1	
	95-ALTA 9.5-06 Restrictions, Minerals - Owner Policy - Improved 92-Form 9.2	
	Submit Canzel	
	Submit Cancel	

- Click on the desired endorsement.
- Click on the Submit button to continue the jacket request.
- Or if necessary, you can click vou can adjust or modify the endorsement.
- Once the jacket or jackets have been received, they will show in the *Active Jackets(s)* list. In addition, they will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the *Digital Files Folder Path* field of the *Digital Files Access* setting under <u>Settings</u>.

Loan       Loan Purpose:       Purchase       Closing Date 1/18/2022       Sales Price:       \$300,000.00         Loan Number:       M-39895839       Loan Amount:       \$250,000.00         Agency       Name:       StewartAccess Test Agency       v         Location:       StewartAccess Test Agency Inc - 1980 Post Oak Suite 800       v         Jacket Options       Property Type:       Residential - General       v         Loan Policy       Owners Policy       Prior Policy       ✓ Simultaneous Issue         Jacket Type:       Please Select a Policy Type       v         Jacket Tom:       Please Select a Jacket Form Type       v         Liability:       \$250,000.00       Effective Date:       1/18/2022       5         Liability:       \$250,000.00       Remittance:       \$7.50         Premium:       \$25.00       Remittance:       \$7.50         Effective Date:       1/18/2022       5       Endorsements         View Jacket(s)       Get Jacket       Type       Status       Created Date         Policy Number       Type       Status       Created Date       \$7/3/2022         Options       M-0000-725685841       Loan Policy       Active       \$7/9/2022         Options       M-	CP	L			Jacket			
Loan Purpose:       Purchase       Closing Date 1/18/2022       Sales Price:       \$300,000.00         Loan Number:       M-39895839       Loan Amount:       \$250,000.00         Agency       Name:       StewartAccess Test Agency <ul> <li>Location:</li> <li>StewartAccess Test Agency Inc - 1980 Post Oak Suite 800</li> <li>Jacket Options</li> <li>Property Type:</li> <li>Residential - General</li> <li>Loan Policy</li> <li>Owners Policy</li> <li>Prioperty Type:</li> <li>Please Select a Policy Type</li> <li>Jacket Type:</li> <li>Please Select a Jacket Form Type</li> <li>Jacket Form:</li> <li>Please Select a Jacket Form Type</li> </ul> Liability:     \$250,000.00           Premium:         \$250,000.00           Endorsements         \$7,50           Endorsements	Loan							
Loan Number: M-39895839       Loan Amount: \$250,000.00         Agency       Name:       StewartAccess Test Agency       *         Location:       StewartAccess Test Agency Inc - 1980 Post Oak Suite 800       *         Jacket Options       Property Type:       Residential - General       *         Loan Policy       Owners Policy       Prior Policy       Simultaneous Issue         Jacket Type:       Please Select a Policy Type       *         Jacket Form:       Please Select a Jacket Form Type       *         Liability:       \$250,000.00       Remittance:       \$7.50         Premium:       \$25.00       Remittance:       \$7.50         View Jacket(s)       Get Jacket         View Jacket(s)       Get Jacket         Policy Number       Type       Status       Created Date         Options       C-0000-724527892       Commitment       Active       \$/3/2022         Options       0-0000-725682121       Owner Policy       Active       \$/9/2022	Loan Purpose:	Pur	chase	Closing	Date 1/18/	2022	Sales Price	e: \$300,000.00
Agency Name: StewartAccess Test Agency  Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  Jacket Options Property Type: Residential - General  VEXAF StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  Jacket Options Property Type: Residential - General  VEXAF StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  Jacket Type: Residential - General  VEXAF StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  Jacket Options Please Select a Policy Type  Vex Jacket Form: Please Select a Jacket Form Type  Effective Date: 1/18/2022  Stewart StewartAccess Test Agency  View Jacket(s)  Endorsements View Jacket(s)  Get Jacket Active Jacket(s)  Created Date Options C-0000-725685841 Loan Policy Active 5/3/2022 Options 0-0000-725682121 Owner Policy Active 5/9/2022	Loan Number:	M-3	39895839				Loan Amoun	t: \$250,000.00
Name:       StewartAccess Test Agency          Location:       StewartAccess Test Agency Inc - 1980 Post Oak Suite 800          Jacket Options       Property Type:       Residential - General          Loan Policy       Owners Policy       Prior Policy       Simultaneous Issue         Jacket Type:       Please Select a Policy Type           Jacket Form:       Please Select a Jacket Form Type           Effective Date:       1/18/2022       15           Liability:       \$250,000.00       Premium:       \$250,000.00           Premium:       \$250,000.00       Remittance:       \$7.50           Active Jacket(s)       Get Jacket             Active Jacket(s)       Get Jacket              Policy Number       Type       Status       Created Date               Options       C-0000-724527892       Commitment       Active       5/3/2022	Agency							
Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  Jacket Options Property Type: Residential - General  Loan Policy Owners Policy Prior Policy Simultaneous Issue Jacket Type: Please Select a Policy Type Jacket Form: Please Select a Jacket Form Type  Effective Date: 1/18/2022 15 Liability: \$250,000.00 Premium: \$25.00 Remittance: \$7.50 Endorsements  View Jacket(s)  Active Jacket(s)  Policy Number Type Status Created Date Options C-0000-724527892 Commitment Active 5/3/2022 Options M-0000-725685841 Loan Policy Active 5/9/2022  Options O-0000-725682121 Owner Policy Active 5/9/2022	N	lame:	StewartA	ccess Test	Agency			Ŷ
Jacket Options Property Type: Residential - General  Loan Policy Owners Policy Prior Policy Simultaneous Issue Jacket Type: Please Select a Policy Type  Jacket Form: Please Select a Jacket Form Type  Effective Date: 1/18/2022  Status  Created Date Options C-0000-724527892 Commitment Active S/3/2022 Options M-0000-725682121 Owner Policy Active S/9/2022	Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 *							
Property Type:       Residential - General         Loan Policy       Owners Policy       Prior Policy       Simultaneous Issue         Jacket Type:       Please Select a Policy Type          Jacket Type:       Please Select a Jacket Form Type          Jacket Form:       Please Select a Jacket Form Type          Effective Date:       1/18/2022       15         Liability:       \$250,000.00       Remittance:       \$7.50         Premium:       \$25.00       Remittance:       \$7.50         Endorsements       View Jacket(s)       Get Jacket         Active Jacket(s)       Get Jacket       Options       C-0000-724527892       Commitment       Active       \$/3/2022         Options       M-0000-725685841       Loan Policy       Active       \$/9/2022         Options       0-0000-725682121       Owner Policy       Active       \$/9/2022	Jacket Options							
Loan Policy       Owners Policy       Prior Policy       Simultaneous Issue         Jacket Type:       Please Select a Policy Type          Jacket Form:       Please Select a Jacket Form Type          Jacket Form:       Please Select a Jacket Form Type          Effective Date:       1/18/2022       15         Liability:       \$250,000.00       Remittance:       \$7.50         Premium:       \$25.00       Remittance:       \$7.50         Endorsements       View Jacket(s)       Get Jacket         Active Jacket(s)       Get Jacket          Policy Number       Type       Status       Created Date         Options       C-0000-724527892       Commitment       Active       \$/3/2022         Options       M-0000-725685841       Loan Policy       Active       \$/9/2022         Options       0-0000-725682121       Owner Policy       Active       \$/9/2022	Property	Type:	Resident	ial - Gener	al			v
Jacket Type: Please Select a Policy Type   Jacket Form: Please Select a Jacket Form Type   Effective Date: 1/18/2022  Liability: \$250,000.00 Premium: \$25.00 Remittance: \$7.50 Endorsements  View Jacket(s)  Active Jacket(s)  Active Jacket(s)  Active Jacket(s)  Created Date  Options C-0000-724527892 Commitment Active 5/3/2022 Options M-0000-725685841 Loan Policy Active 5/9/2022 Options O-0000-725682121 Owner Policy Active 5/9/2022	Loan Policy Owners Policy Prior Policy Simultaneous Issue							
Jacket Form: Please Select a Jacket Form Type   Effective Date: 1/18/2022 15 Liability: \$250,000.00 Premium: \$25.00 Remittance: \$7.50 Endorsements  View Jacket(s)  Active Jacket(s)  Active Jacket(s)  Policy Number Type Status Created Date Options C-0000-724527892 Commitment Active 5/3/2022 Options M-0000-725682121 Owner Policy Active 5/9/2022  Options O-0000-725682121 Owner Policy Active 5/9/2022	Jacket Type: Please Select a Policy Type ~							
Effective Date: 1/18/2022 15 Liability: \$250,000.00 Premium: \$25.00 Remittance: \$7.50 Endorsements View Jacket(s) Get Jacket Active Jacket(s) Active Jacket(s) Policy Number Type Status Created Date Options C-0000-724527892 Commitment Active 5/3/2022 Options M-0000-725685841 Loan Policy Active 5/9/2022 Options O-0000-725682121 Owner Policy Active 5/9/2022	Jacket Fo	Jacket Form: Please Select a Jacket Form Type ~						
Liability: \$250,000.00 Premium: \$25.00 Remittance: \$7.50 Endorsements View Jacket(s) Get Jacket Active Jacket(s) Active Jacket(s) Policy Number Type Status Created Date Options C-0000-724527892 Commitment Active 5/3/2022 Options M-0000-725685841 Loan Policy Active 5/9/2022 Options O-0000-725682121 Owner Policy Active 5/9/2022	Effective D	ate:	1/18/2022	15				
Premium: \$25.00 Remittance: \$7.50 Endorsements View Jacket(s) Get Jacket Active Jacket(s) Policy Number Type Status Created Date Options C-0000-724527892 Commitment Active 5/3/2022 Options M-0000-725685841 Loan Policy Active 5/9/2022 Options O-0000-725682121 Owner Policy Active 5/9/2022	Liab	ility:	\$2	250,000.00	]			
View Jacket(s)         Get Jacket           Active Jacket(s)         Get Jacket           Policy Number         Type         Status         Created Date           Options         C-0000-724527892         Commitment         Active         5/3/2022           Options         M-0000-725685841         Loan Policy         Active         5/9/2022           Options         O-0000-725682121         Owner Policy         Active         5/9/2022	Premi	ium:		\$25.00		Remit	tance:	\$7.50
View Jacket(s)         Get Jacket           Active Jacket(s)            Policy Number         Type         Status         Created Date           Options         C-0000-724527892         Commitment         Active         5/3/2022           Options         M-0000-725685841         Loan Policy         Active         5/9/2022           Options         O-0000-725682121         Owner Policy         Active         5/9/2022							Enc	dorsements
View Jacket(s)         Get Jacket           Policy Number         Type         Status         Created Date           Options         C-0000-724527892         Commitment         Active         5/3/2022           Options         M-0000-725685841         Loan Policy         Active         5/9/2022           Options         O-0000-725682121         Owner Policy         Active         5/9/2022								
Policy Number       Type       Status       Created Date         Options       C-0000-724527892       Commitment       Active       5/3/2022         Options       M-0000-725685841       Loan Policy       Active       5/9/2022         Options       O-0000-7256852121       Owner Policy       Active       5/9/2022						View J	acket(s)	Get Jacket
Policy NumberTypeStatusCreated DateOptionsC-0000-724527892CommitmentActive5/3/2022OptionsM-0000-725685841Loan PolicyActive5/9/2022OptionsO-0000-725682121Owner PolicyActive5/9/2022	Active Jacket(s	5) —						
Options         C-0000-724527892         Commitment         Active         5/3/2022           Options         M-0000-725685841         Loan Policy         Active         5/9/2022           Options         O-0000-725682121         Owner Policy         Active         5/9/2022	P	olicy	Number		Туре	St	atus	Created Date
Options         M-0000-725685841         Loan Policy         Active         5/9/2022           Options         O-0000-725682121         Owner Policy         Active         5/9/2022	Options	C-(	0000-7245	27892	Commitm	ent	Active	5/3/2022
Options O-0000-725682121 Owner Policy Active 5/9/2022	Options	M-	0000-7256	85841	5841 Loan Policy Active 5/9/2022			
	Options	0-	0000-7256	00-725682121 Owner Policy Active 5/9/2022				

• There are several functions that can be performed on jackets. Clicking on the Options button will display the functions available for the jackets.

Active Jack	ket(s)					
	Po	licy Number	Туре		Status	Created Date
Options	;	C-0000-724527892	Comm	nitment	Active	5/3/2022
Options	;	M-0000-725685841	Loan	Policy	Active	5/9/2022
Options		O-0000-725682121	Owne	r Policy	Active	5/9/2022
	a,	View Jacket			•	•
		Download Jacket				
		Void Jacket				
	2	Edit Jacket				

• You can view a jacket, download a copy of a jacket, void a jacket and edit a jacket.

- To view a jacket, click on *View Jacket*. The jacket will be displayed on your screen in PDF format.
- If for some reason you need another copy of a jacket, you can get one by clicking on *Download Jacket*. This will download the jacket to your system and display it in PDF format on your screen.
- If it becomes necessary to void a jacket, you can do so by clicking on *Void Jacket*. In order to void a jacket, you will need to provide a reason for the void. Therefore, you will be prompted to select a reason.

Void Owner Policy						
Are you sure you want to VOID Owner Policy - Policy #0-0000-725682121?						
Reason:	Please Selec	t a Voi	d Reason	~		
	YES		NO			

• Select a reason from the *Reason* drop-down list.

67



• Click to complete the void. You will see a confirmation that the jacket has been voided.

Stewart Title Insurance Company	×
Jacket Product Voided!	
ОК	

- The jacket will no longer be shown in the *Active Jacket(s)* list.
- Click if you change your mind and do not want to void the jacket.

You can edit a jacket if necessary. If you just want to update some information related to the policy jacket such as the liability, premium or effective date, it is not necessary to void the current jacket and request a new jacket. You can accomplish this with the edit jacket function.

• Click on the *Edit Jacket* selection. The *Jacket* tab will load with the policy jacket that was selected for editing.

Jacket		Prior Policy				Sir	multaneous Issue
Jacket	Type:	Loan					U
Jacket F	Form:	ALTA Loan Po	olicy - Fl	- 6-17-200	06		U
Effective	Date:	1/18/2022	15	]			
Lial	bility:	\$250	,000.00				
Pren	nium:		\$25.00		Re	mittance:	\$7.50
						E	ndorsements
					Vie	w Jacket(s)	Get Jacket
Active Jacket	(s) —						
	Policy	Number		Туре		Status	Created Date
Options	C-	0000-7245278	892	Commitn	nent	Active	5/3/2022
Options	M	-0000-725685	841	Loan Po	licy	Active	5/9/2022
							•

Notice that the jacket type and jacket form selections are disabled. That is because you are editing an existing jacket, not requesting a new jacket. Therefore, you cannot change those selections.

You also cannot edit endorsements when editing a jacket. Therefore the endorsements button is disabled. Endorsements can only be modified using the post policy endorsements function that will be explained next.

Information that can be revised are the effective date, property type, agency location, prior policy information, liability, premium, remittance and if revising a short form loan policy, the form fields. If the liability, premium and/or remittance need to be updated, that information must be changed in the closing file prior to accessing the Stewart Title underwriter service. Those fields cannot be edited in the integration.

- Make the necessary changes and click the Get Jacket button. The policy jacket will be re-issued with the same policy number but updated with the new information.
- If you decide you do not want to edit the jacket, you can select *Cancel Edit* from the *Options* selections.

Active Jacket(s)							
	Poli	cy Number	Туре		Status	Created Date	
Options		C-0000-724527892	Comm	itment	Active	5/3/2022	
Options		M-0000-725685841	Loan	Policy	Active	5/9/2022	
	a,	View Jacket					
		Download Jacket					
		Void Jacket					
	Z	Cancel Edit					

• The *Jacket* tab will exit the edit mode and return to jacket request mode.

If the property is in a state that charges for CPLs, the *Edit CPL Fee* button will become active upon the completion of the jacket request.

CF	PL	l	Jacket		
Loan					
Loan Purpose	: Purchase	Closing Da	ate 1/18/2022	Sales Price	e: \$300,000.00
Loan Number	r: M-39895839			Loan Amoun	t: \$250,000.00
Agency					^
Ν	Name: Stewart4	Access Test Ag	ency		~
Loc	ation: Stewart	Access Test Ag	ency Inc - 1980	Post Oak Suite	800 ~
Jacket Options	5				
Property	Type: Resident	tial - General			v
Jacket	Prior Poli	cy		Simu	ultaneous Issue
Jacket T	Type: Please Se	lect a Policy T	ype		Ŷ
Jacket F	orm: Please Se	lect a Jacket F	orm Type		~
Effective [	Date: 1/18/2022	2 15			
Liat	pility:	\$0.00			
Prem	nium:	\$0.00	Rer	nittance:	\$0.00
		40.00		En	larramenta
					Jorsements
			Viev	v Jacket(s)	Get Jacket
Active Jacket(	(s)				
	Policy Number	Ţ	ype	Status	Created Date
Options	M-0000-7295	541591	Loan Policy	Active	5/19/2022
		PPE	Edit CPL Fe	ee View Al	Close

This will enable you to revise the premiums for the CPLs if necessary.

70

• Click on the Edit CPL Fee button, The *Edit CPL Fees* dialog box will be displayed showing all active CPLs for the transaction.

EDIT CPL FEES		_
CPL #: 725848997	Fee: 25.00 Remittance: 25.00	Revise
CPL #: 729533067	Fee: 25.00 Remittance: 25.00	Revise

- Click in the *Fee* and *Remittance* fields and enter the desired fee for the CPL.
- Click Revise. You will see a confirmation that the premium revision was successful.

Stewart Title Insuran	ce Company 🛛 🗙
CPL Premium Revise :	successful!
	ОК

- Click to continue.
- Close the *Edit CPL Fees* dialog box by clicking on the X in the title bar of the dialog box.
- You can view all jackets that have been requested for the transaction whether active or void by clicking the View Jacket(s) button. This will display the Jackets Window dialog box.

Stewart Tit	tle Insurance Company: J	ackets Window		×
Action	Policy Number	Туре	Status	Created Date
View	O-0000-725745551	Owner Policy	Active	5/9/2022 4:52:09 1
View	M-0000-725685841	Loan Policy	Active	5/9/2022 11:28:52
View	C-0000-724527892	Commitment	Active	5/3/2022 10:26:09
View	O-0000-725682121	Owner Policy	Void	5/9/2022 11:28:53
View	C-0000-698928791	Commitment	Void	3/24/2022 5:29:31
				Close

- You can view an active jacket by clicking on the *View* link. It will be displayed on your screen in PDF format.
- Void or inactive jackets cannot be viewed and therefore the *View* link is disabled for those jackets.
- Click Close to close the *Jackets Window* dialog box.

You can view all CPLs and policy jackets that have been requested for the transaction by clicking on the View All button. This will display the *All Documents* dialog box. This will provide you with a history of all title products requested for the transaction.
Action	Reference #		Status	Туре	Created Date
View	696055157		Active	Buver/Borrower CPL	3/18/2022 3:10:32 PM
View	699456869		Void	Lender CPL	3/25/2022 3:12:23 PM
View	696059926		Void	Lender CPL	3/18/2022 3:02:57 PM
ts					
Action	Policy Number	Status	Тур	e	Created Date
View	O-0000-725745551	Active	Owr	er Policy	5/9/2022 4:52:09 PM
View	M-0000-725685841	Active	Loai	n Policy	5/9/2022 11:28:52 AM
View	C-0000-724527892	Active	Con	mitment	5/3/2022 10:26:09 AM
View	O-0000-725682121	Void	Owr	ner Policy	5/9/2022 11:28:53 AM
View	C-0000-698928791	Void	Con	mitment	3/24/2022 5:29:31 PM
					Clo

- You can view an active product by clicking on the *View* link. Voided products cannot be viewed.
- Click Close to close the *All Documents* dialog box.

## **Closing the Stewart Underwriter Service**

When you have finished requesting title products, click the **Close** button to close the Stewart Title underwriter service.

If you have requested title policy jackets, you will see the following message upon returning to the *Landtech* closing file.

Landtech XML	×
Your LT file will be saved with the new Policy Number inform	nation
	OK ]

• Click to continue. The policy numbers will be imported into the appropriate fields on the *Title Insurance* dialog box in the *Landtech* closing file.

## **Post Policy Endorsements**

74

There may be times when it becomes necessary to add, modify or delete endorsements associated with a previously issued jacket. The Stewart Title underwriter service provides a way to do this.

- Open the *Landtech* closing file that the policy jacket was issued under.
- Launch the Stewart Title underwriter service.

nsurance Con	npany Integra	tion (2.0.1.27	7). LT-File: 202	210178						
///^s	stev	vart						<u>S</u> La	tewart Title Insu ndtech Title Insu	urance Company Web urance and Endorsem
File File Number	r: 20210178	Login	D: LTUser1@dev.	picdev.local		CPL		Jacket		
Property Property Type: Address 1: Address 2: State: County: Legal Desc: Lender Informati Name: Address 1: Address 2: City:	Residential (1-4 fam 1234 Main Street FL Balm Beach Lot 79, Block 120, C on Bank of America 7105 Corporate Driv Plano	ily) City: Wellin Incean View Subdy	gton 2 (sion, Palm Beach ( Zip: 7	Zip: 33414 County, Florid	ia.	Loan     Loan Purpose: Purc     Loan Number: M-3     Agency     Name:     Location:     Branch:     CPL Options     Type     CPL Form     Effective Date:     Lender Clause     Attention:     Createments	StewartAccess StewartAccess Include All Bra Losing Pro 5/19/2022 Its successors	sing Date 1/18/2 Test Agency Inc - anches Buyer stection Letter 15 and or assigns as t	222 Saless Loan Ar 1980 Post Oak S	Price:         \$300,000,00           mount:         \$250,000,00           vi         vi           Suite 800         v           v         vi           Seller         vi           ay appear.         vi
Lender Clause: Agent Informatio	its successors and/	or assigns				Search Secondary Search Settlemen	Agency t Company			
Name: Address 1: City: Email:	Titles R Us 1000 Main Street Royal Palm Beach closings@titlesrus.co	Contact: Address 2: State: DM Phone:	Steve Vogt Florida 5615559928	Zip: 33411 Fax: 56155	53988	Active CPL(s) CPL Num Options 72969	ber Typ 99997	e Lender CPL	Status Active	Get CPL Created Date 5/19/2022
Borrower Party Type La INDIVIDUAL Jo INDIVIDUAL Jo INDIVIDUAL Ha INDIVIDUAL Ha Seller Party Type La INDIVIDUAL W INDIVIDUAL W INDIVIDUAL Re	ast Name First Nam ihnson James ihnson Sara arper Charles arper Jane st Name First Nam filliams Bill filliams Nancy ennett Robert	ne Middle Name	Company Name	Long Name	Status his wife his wife Status his wife			PPE Edit C	PL Fee Vie	sw All Close



• Click the **PPE** button at the bottom of the dialog box. The **Post Policy Endorsements** dialog box will be displayed.

POST-POLICY ENDORSEM	MENTS									_	
Original Jacket											
Original Jacket:				~							
OPN:		L	iability:								
Effective Date:	Select a date	15									
Jacket											
Endorsements											
Select End	dorsement Name			Effective Date		Premium	Remittance				
			~	5/11/2022	15	0.00	0.00	Ad	d Endorsement		
							Submit C	hanges	Cancel		

• Select the policy jacket that you want to modify by clicking on the down arrow for the *Original Jacket* field. The *Original Jacket* drop-down list will be displayed containing the policy jackets issued for the transaction.

POST-POLICY ENDORSEM	MENTS					_   =   ×
Original Jacket Original Jacket: OPN: Effective Date:	Loan-M-0000-725685841-ALTA Loan F Owners-O-0000-725745551-ALTA Own	• Policy - FL - 6-17-2006 ners Policy - FL - 6-17-2006				
Jacket Endorsements				]		
Select End	dorsement Name	Effective Date	Premium	Remittance		
		~ 5/11/2022 <b>15</b>	0.00	0.00	Add Endorsement	
				Submit (	Changes Cancel	



• Select the desired policy jacket by clicking on it. The information and endorsements pertaining to that jacket will load.

	cket: Owners-O-0000-725745551-ALTA Owners Polic	y - FL - 6-17-2 👻			
	DPN: 725745551 Liability:	\$300,000.00			
Effective	Date: 1/21/2022 15				
lacket					
Endorsem	ints				
Select	Endorsement Name	Effective Date	Premium	Remittance	
~	ALTA 5.1-06 Planned Unit Development - FL - Rev 6	1/21/2022 15	25.00	7.50	
✓	ALTA 9.1-06 Restrictions, Encroachments, Minerals	1/21/2022 15	135.50	40.65	
			0.00	0.00	

The original policy number, the liability and the effective date cannot be changed. Only endorsements can be modified.

• If you need to add an endorsement, click on the down arrow 💽 for the endorsement selections. A drop-down list containing all endorsements available to be selected will be displayed.

Original Jacke	t					
Original Jac	ket: Owners-O-0000-725745551-ALTA Owners Polie	cy - FL - 6-17-2 💉				
0	PN: 725745551 Liability:	\$300,000.00				
Effective D	ate: 1/21/2022					
Jacket						
Endorsemer	ıts					
Select	Endorsement Name	Effective Date	Premium	Remittance		
~	ALTA 5.1-06 Planned Unit Development - FL - Rev	¢ 1/21/2022 15	25.00	7.50		
	ALTA 9.1-06 Restrictions, Encroachments, Minerals	1/21/2022	135.50	40.65		
		1/21/2022 15	1			
		1/21/2022 15	0.00	0.00	bbΔ	Endorsement
	v	1/21/2022 15	0.00	0.00	Add	Endorsement
	v ALTA 4.1-06 Condominium - FL - Rev 6-17-2006	1/21/2022	0.00	0.00	Add	Endorsement
	× ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6	1/21/2022 15 -17-2006 -17-2006	0.00	0.00	Add	Endorsement
	<ul> <li>ALTA 4.1-06 Condominium - FL - Rev 6-17-2006</li> <li>ALTA 5.1-06 Planned Unit Development - FL - Rev 6</li> <li>ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6</li> <li>ALTA 9.1-06 Restrictions Encroachments Minerals</li> </ul>	1/21/2022	0.00	0.00	Add	Endorsement
	<ul> <li>ALTA 4.1-06 Condominium - FL - Rev 6-17-2006</li> <li>ALTA 5.1-06 Planned Unit Development - FL - Rev 6</li> <li>ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6</li> <li>ALTA 9.1-06 Restrictions, Encroachments, Minerals</li> <li>FL Survey</li> </ul>	1/21/2022 -17-2006 -17-2006 - FL - Rev 12-1-2013	0.00	0.00 Submit (	Add	Endorsement
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200	1/21/2022 -17-2006 -17-2006 - FL - Rev 12-1-2013 26	0.00	0.00 Submit (	Add	Endorsement
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200 ALTA 23.1-06 Co-Insurance - Multiple Policies FL Re	1/21/2022 -17-2006 -17-2006 - FL - Rev 12-1-2013 06 v 8-1-2017	0.00	0.00 Submit (	Add	Endorsement
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200 ALTA 23.1-06 Co-Insurance - Multiple Policies FL Re ALTA 5.1-06 Planned Unit Development - FL - Rev 6	1/21/2022 i-17-2006 -17-2006 - FL - Rev 12-1-2013 06 v 8-1-2017 i-1-1987	0.00	0.00 Submit (	Add	Endorsement
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200 ALTA 23.1-06 Co-Insurance - Multiple Policies FL Re ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 9.2-06 Restrictions, Encroachments, Minerals	1/21/2022 15 i-17-2006 -17-2006 - FL - Rev 12-1-2013 06 iv 8-1-2017 i-1-1987 - Imprvd Land - FL - 12-1	-2013	0.00 Submit (	Add	Endorsement
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200 ALTA 2.1-06 Co-Insurance - Multiple Policies FL Re ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 9.2-06 Restrictions, Encroachments, Minerals FL Change of Partners - Members - Shareholders	1/21/2022 i-17-2006 -17-2006 - FL - Rev 12-1-2013 06 v: 8-1-2017 i-1-1987 - Imprvd Land - FL - 12-1	-2013	0.00 Submit (	Add	Endorsement Cancel
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200 ALTA 23.1-06 Co-Insurance - Multiple Policies FL Re ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 9.2-06 Restrictions, Encroachments, Minerals FL Change of Partners - Members - Shareholders FL Contiguity	1/21/2022 15 -17-2006 -17-2006 - FL - Rev 12-1-2013 06 rv 8-1-2017 -1-1987 - Imprvd Land - FL - 12-1	-2013	0.00 Submit (	Add	Endorsement Cancel
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-200 ALTA 23.1-06 Co-Insurance - Multiple Policies FL Re ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 9.2-06 Restrictions, Encroachments, Minerals FL Change of Partners - Members - Shareholders FL Contiguity FL Navigational Servitude	1/21/2022 15 -17-2006 -17-2006 - FL - Rev 12-1-2013 06 rv 8-1-2017 1-1987 - Imprvd Land - FL - 12-1	-2013	0.00 Submit (	Add	Endorsement Cancel
	ALTA 4.1-06 Condominium - FL - Rev 6-17-2006 ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6 ALTA 9.1-06 Restrictions, Encroachments, Minerals FL Survey ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-20( ALTA 23.1-06 Co-Insurance - Multiple Policies FL Re ALTA 5.1-06 Planned Unit Development - FL - Rev 6 ALTA 9.2-06 Restrictions, Encroachments, Minerals FL Change of Partners - Members - Shareholders FL Contiguity FL Navigational Servitude FL Option	1/21/2022 15 i-17-2006 - FL - Rev 12-1-2013 D6 iv 8-1-2017 i-1-1987 - Imprvd Land - FL - 12-1	-2013	0.00 Submit (	Add	Endorsement Cancel

• Select the desired endorsement by clicking on it.

Original Jacke	t				
Original Jac	ket: Owners-O-0000-725745551-ALTA Owners Po	olicy - FL - 6-17-2 💉			
c	DPN: 725745551 Liabilit	y: \$300,000.00			
Effective D	Date: 1/21/2022				
Jacket					
Endorseme	nts				
Select	Endorsement Name	Effective Date	Premium	Remittance	
~	ALTA 5.1-06 Planned Unit Development - FL - Re	ev € 1/21/2022 15	25.00	7.50	
~	ALTA 9.1-06 Restrictions, Encroachments, Minera	als 1/21/2022	135.50	40.65	
	ALTA 7-06 Manufacturing Housing Unit - FL - R	× 1/21/2022 15	100.00	30.00	Add Endorsement

- The effective date defaults to the policy effective date. It can be changed if necessary. To change it, click in the *Effective Date* field and enter the date or click on the calendar icon **is** and select a date from the pop-up calendar.
- Click in the *Premium* field and enter the premium being charged for the endorsement.
- Click in the *Remittance* field and enter the remittance or underwriter fee for the endorsement.
- Click the Add Endorsement button to add the endorsement. It will be displayed in the list and automatically selected.

Original Ja	sket: Owners O 0000 735745551 ALTA Owners I	Deliev EL 6 17 0 M			
Original Ja	705745551-ALIA Owners 1	Policy - PL - 0-17-2			
(	JPN: 725745551 Liabil	ity: \$300,000.00			
Effective [	Date: 1/21/2022 15				
acket					
Endorseme	nts				
choorsenie					
Select	Endorsement Name	Effective Date	Prem	ium Remittance	
~	ALTA 5.1-06 Planned Unit Development - FL - F	Rev 6 1/21/2022	15	25.00 7.50	
~	ALTA 9.1-06 Restrictions, Encroachments, Mine	rals 1/21/2022	15	135.50 40.65	1
~	ALTA 7-06 Manufacturing Housing Unit - FL - R	Rev 6 1/21/2022	15	100.00 30.00	
			I	<b>I</b>	1
	ALTA 7-06 Manufacturing Housing Unit - FL - R	<ul> <li>1/21/2022</li> </ul>	15	30.00	Add Endorsement

• Click the <u>Submit Changes</u> button to submit the endorsement. You will receive confirmation that the change to the policy jacket was applied successfully.

Stewart Title Insurance Company	×
Policy Jacket changes applied!	
OK	

- Click OK to continue. You will be returned to the *Post Policy Endorsement* dialog box.
- If you need to delete an endorsement, you can do so by unchecking the check box in the *Select* column for the endorsement that you want to delete.

Original Jacket						
Original Jacke	t: Loan-M-0000-725685841-ALTA	Loan Policy - FL - 6-17-	2006 ~			
OPI	N: 725685841	Liability: \$2	250,000.00			
Effective Date	e: 1/21/2022					
Jacket						
Endorsements	;					
Select	Endorsement Name	Effecti	ve Date	Premium	Remittance	
~	ALTA 5.1-06 Planned Unit Developm	nent - FL - Rev ( 1/18/2	2022 15	25.00	7.50	
	ALTA 8.1-06 Environmental Protecti	on Lien - FL - 6- 1/18/2	2022 15	25.00	7.50	
				100.00	20.00	
		~ 1/18/20	15	100.00	30.00	Add Endorsement

• To complete the deletion, click on the <u>Submit Changes</u> button. You will receive confirmation that the policy changes were applied successfully.

Stewart Title Insurance Company $$ $$ $$ $$ $$ $$
Policy Jacket changes applied!
OK

- You can also modify an existing endorsement. You can change the effective date, the premium and/or the remittance. Once you have made the changes, click on the Submit Changes button. Once again you will receive confirmation that the changes were applied successfully.
- When you have finished with the post policy endorsement modifications, click the Cancel button to close the *Post Policy Endorsements* dialog box.
- Click Close to close the Stewart Title underwriter service.

## Lender Information

Normally the lender information is used to populate the *Lender* section of the product request screen. However, if you need a different entity in that section, such as a different office or location in the lender's organization, you can use the *Title Insurance* fields in the *Lender* database to provide the name and address of that entity.

To do so:

81

• Click on <u>*Data Entry*</u> on the menu bar or press ALT + D. The <u>*Data Entry*</u> drop-down menu will be displayed.



- Click on *Database* or press **B**. The *Databases* dialog box will be displayed.
- Click on the *Lender* button to display the *Lender* database. Scroll down to the fields labeled *Title Ins. Name*, *Title Ins. Clause*, *Title Ins. Attn/Contact*, *Title Ins. Street*, and *Title Ins. City, State Zip, Title Ins. E-mail, Title Ins. Fax*, and *Title Ins. Phone*.

🗎 Databases - Lender				×
Company	<< <u>F</u> irst < <u>P</u> rev	Next> Last>>		
Lender	C bu Name C	hulD O huNMISId		
Trustee	··· Dy Name ···	by ID O Dy NMES IG		
Loan Officer	Pymt Street	7105 Corporate Drive	^	Paste & E <u>x</u> it
Mortgage Broker	Pymt City, State Zip	Plano, TX 75024-4100		
Mta Broker Associate	EIN	581293745		<u>C</u> lose
Deeltee	Cert. of Ins. Name			Undate
Realtor	Cert. of Ins. Attn/Cor	Bill Johnson		
Realtor Associate	Cert. of Ins. Street			Clear
Payto	Cert. of Ins. City, Stal			
Closer/Processor	Cert. of Ins. E-mail			Add
Sales Rep.	Lert. of Ins. Fax			
Business Company	Lert. of Ins. Phone	Devil of Assertion, MA		Delete
Business Associate	Title Ins. Name	Bank or America, NA		Help
Condo	Title Ins. Clause	Ris successors and/or assigns Dill Lefferson		
Alterney	Title Ins. Attri/Contat	1500 Central Aug		View N <u>o</u> te
Automey	Title Ins. Dite State 7	Atlanta GA 30032		
Attorney Associate	Title Ins. E-mail	titlenolicies@boa.com		
Additional 1	Title Inc. Fav.	800.555.6604		
Additional 2	Title Ins. Phone	800-555-6603		
Additional 3	NMLS ID	4234674643		
Additional 4	NMLS Issue Date	10/15/03		
Underwriter	License 1	TX-83728282		
Mortgage Ins Company	License State 1	TX		
	1 I D 1	10/10/00	4	

• Enter the information for the desired entity in the appropriate fields and click  $U^{pdate}$  or press ALT + U to save the changes.

You will need to do this for each lender that needs an alternate entity for the product requests.

With these fields initialized, the *Lender* dialog box will display a check box labeled *Use Title Insurance Address for Product Request*. It will be checked by default. This will cause the *Lender* section of the product request screen to populate with the alternate entity and will serve as the lender information submitted for the product request.

💐 Loan - Lender						×
New Loss Amount	Loan Number M-201	3849201 Mtg Ins Case #		ase ID		
Decision of Decements	111201	ing ins case w	,		p	<u>U</u> k
Projected Payments	Loan Officer Phil Se	vmore		न 🗁		Cancel
cfpb Loan Terms						
Interest	Lender ID	00000001		<b>^</b>		8
Lender	Loan Uthcer Name	Phil Seymore				<u>₽</u> ∕
Mortagae Broker	Street Address			-		rfn
Moligage bloker	City State Zin			-		
Escrow Heserves	Phone	561,555,4218		- ~		Combined
Deed/Loan Rec Info	Lender ID 0000001					Payees
	Note Updated: 08/06/18	at 02:40pm				Help
	Cash affina Dhana	at oz.+opm				
	Lert, or Ins. Phone	Pauls of America, NA		- ^ 💆	<u></u>	
	Title Ins. Name	Bank of America, NA		-		
	Title Ins. Attn/Contact	Bill Jefferson		-	Lender Long Name	<i>•</i>
	Title Ins. Street	1500 Central Ave		-		
	Title Ins. City. State Zin	Atlanta GA 30032			Lender Long Clause	
	Title Ins. E-mail	titlepolicies@boa.com		-		
	Title Ins. Fax	800-555-6604				
	Title Ins. Phone	800-555-6603		-		
	NMLS ID	4234674643		-		
	NMLS Issue Date			-		
	License 1	TX-83728282		-		
	License State 1	TX		~		
	I I I I I I I I I I I I I I I I I I I	i daharan (as Drashuat Damusat)	Line Long Mana for Dealerst Dage	- *		
	Je ose nile insulance a		Use Long Name on CD	630		
	Trustee			💽 🚞	E-mail	
	Trustee Id			^		
	Trustee Name					
	Street Address					
	City, State, Zip					
	Phone			_		
	Phone 2			_		
	Fax			_		
	Fax 2			¥		
	11.20					

If for some reason you do not want the alternate entity for the product request in a particular closing file, you can always uncheck this check box and the primary lender information will be used instead.

If you have entered a long name for the lender, the *Use Long Name for Product Request* check box will automatically be checked. This will cause the long name to be used in the product request. If you do not want to use the long name in the product request, uncheck the *Use Long Name for Product Request* check box.

## **Product Display**

83

*Product Display* enables you to view Closing Protection Letters (CPL) and title insurance policy jackets downloaded through the Stewart Title underwriter service.

To view downloaded Stewart Title products:

- Click on *Ser<u>v</u>ices* on the menu bar or press ALT + V. The *Ser<u>v</u>ices* drop-down menu is displayed.
- Position the mouse pointer on <u>Underwriter</u> or press U.

Ser <u>v</u> ices		-
Initialize Services		
<u>U</u> nderwriter	$\rightarrow$	Product Display
Portals	>	Agents National Title
Lien or Title Search		Alliant National
Recording	>	CATIC
Marketing	>	CATIC Title
Survey	>	First American
Notaries	>	FNTG
View Emails		Investors Title
		North American
		Old Republic
		Security Title
		Stewart
		The Fund
		Title Resources - TR
		Westcor
		WFG

- Click on *Product Display*.
- A list of all title products downloaded for the current open closing file and any other PDF documents stored in the same location will be displayed.

1	Underwriter Product Display PDF Files		×
	File Name	Date	
	Stewart           20210178-CPL-BuyerCPL-696055157.pdf           20210178-CPL-LenderCPL-6990505926.pdf           20210178-CPL-LenderCPL-699456869.pdf           20210178-Jacket-Commitment-1845579.pdf           20210178-Jacket-Commitment-724527892.pdf           20210178-Jacket-LoanPolicy-725685841.pdf           20210178-Jacket-OwnerPolicy-725745551.pdf	03/18/22 03:10:32 PM 03/18/22 03:02:58 PM 03/25/22 03:12:23 PM 03/24/22 05:29:32 PM 05/09/22 02:50:54 PM 05/09/22 04:48:03 PM 05/09/22 04:52:09 PM	



• Click on the desired document and click View. You can also double-click on the document. The document will open on your screen for viewing.

**Note:** *Product Display* will not be active if you are not in a closing file or if you have not initialized the Stewart Title underwriter service in *Landtech*.

