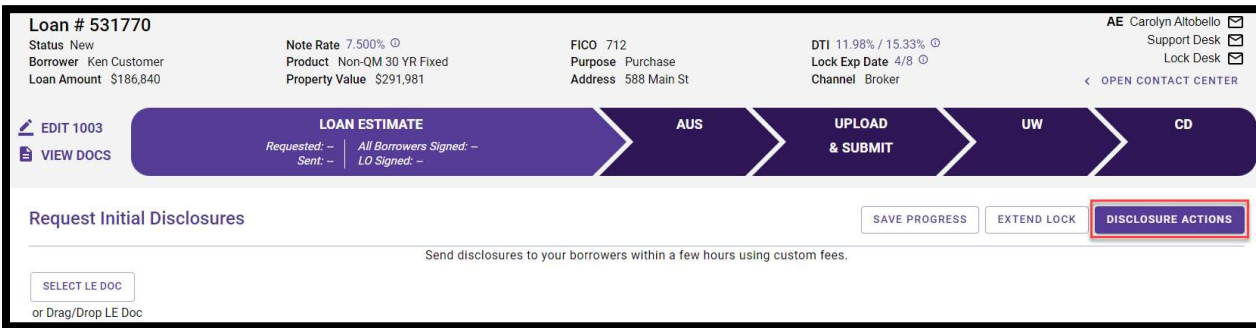


## Broker Assistance – How to Request, E-Sign and View Initial Disclosures

The following instructions are how a Broker will request the initial disclosures package and electronically sign their disclosures.

### Step 1: Submit Request to FCM TPO through G Connect.

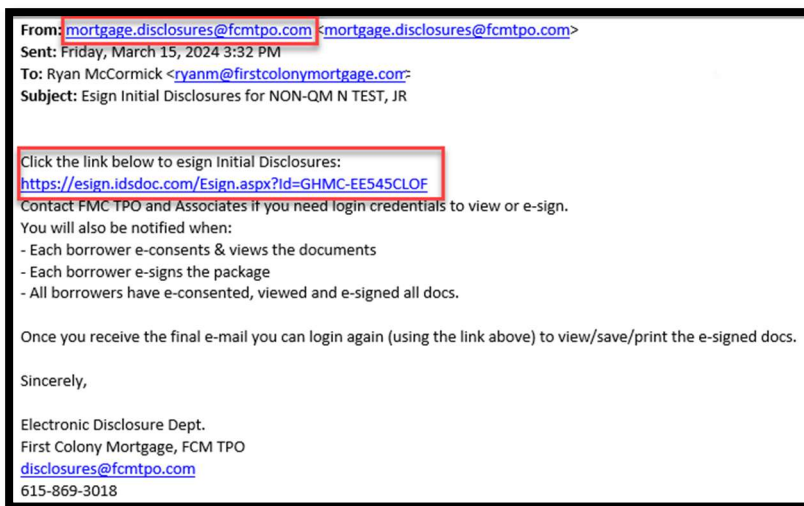
- Click on **Loan Estimate** tab on the Loan Tracker.
- When you are ready to request the **Loan Estimate**, click the **Disclosure Actions** button.



The screenshot shows the Loan Tracker interface for Loan # 531770. The 'LOAN ESTIMATE' tab is selected, and the 'DISCLOSURE ACTIONS' button is highlighted with a red box. The interface includes fields for Loan #, Status, Borrower, Loan Amount, Note Rate, Product, Property Value, FICO, Purpose, Address, DTI, Lock Exp Date, and Channel. A progress bar shows the steps: LOAN ESTIMATE, AUS, UPLOAD & SUBMIT, UW, and CD. Below the progress bar, there are buttons for 'SAVE PROGRESS', 'EXTEND LOCK', and 'DISCLOSURE ACTIONS'. A 'SELECT LE DOC' button is also visible.

### Step 2: Access the IDS website.

- The Broker will receive an email from [mortgage.disclosures@fcmtpo.com](mailto:mortgage.disclosures@fcmtpo.com).  
*Note: This may go to junk/spam email folders.*
- Click on the link provided in the email.

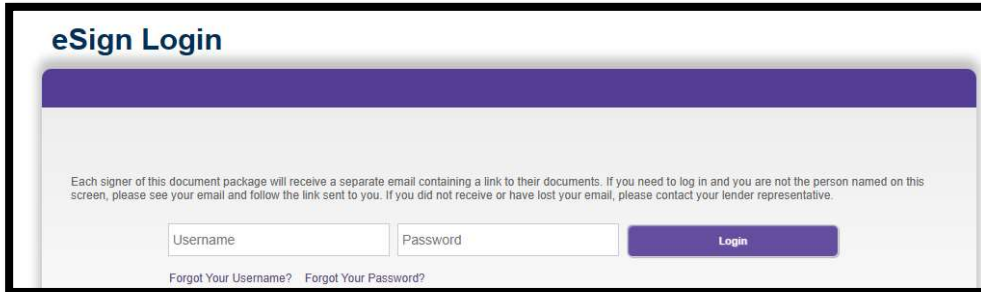


### Step 3: Log in to the IDS website.

- Enter the **IDS** username and password.

*Note: This username and password will be different from the G Connect credentials. For assistance with Login information please contact the Support Department at [support@fcmtpo.com](mailto:support@fcmtpo.com).*

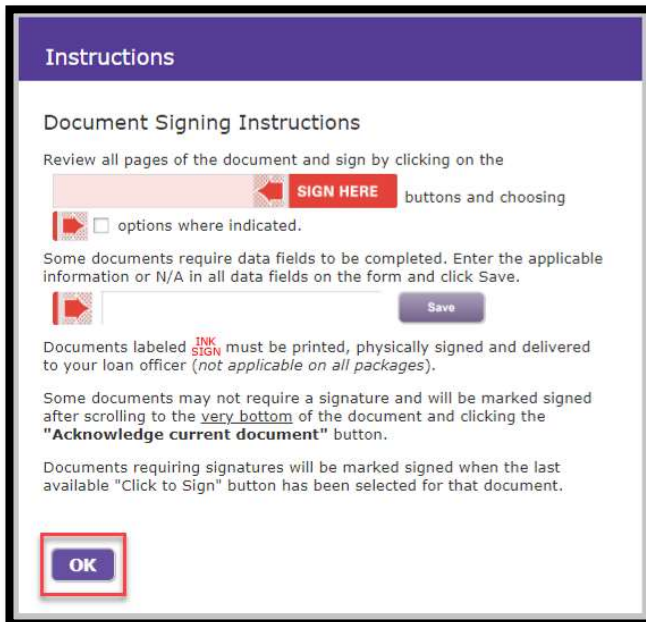
- Click on **Login**.





The image shows a screenshot of the 'eSign Login' page. At the top, it says 'eSign Login'. Below that is a purple header bar. The main content area has a light gray background with a small paragraph of text: 'Each signer of this document package will receive a separate email containing a link to their documents. If you need to log in and you are not the person named on this screen, please see your email and follow the link sent to you. If you did not receive or have lost your email, please contact your lender representative.' Below the text are two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a purple 'Login' button. At the bottom of the form, there are two links: 'Forgot Your Username?' and 'Forgot Your Password?'.

### Step 4: Review the Instructions Page.

- After reviewing the instructions click on **OK**.



The image shows a screenshot of the 'Instructions' page. The title is 'Instructions' in a purple header. Below the title is the section 'Document Signing Instructions'. The text reads: 'Review all pages of the document and sign by clicking on the  buttons and choosing  options where indicated.' Below this, it says: 'Some documents require data fields to be completed. Enter the applicable information or N/A in all data fields on the form and click Save.' There is a 'Save' button. The next paragraph says: 'Documents labeled **INK SIGN** must be printed, physically signed and delivered to your loan officer (not applicable on all packages).' The following paragraph says: 'Some documents may not require a signature and will be marked signed after scrolling to the very bottom of the document and clicking the "Acknowledge current document" button.' The final paragraph says: 'Documents requiring signatures will be marked signed when the last available "Click to Sign" button has been selected for that document.' At the bottom left, there is a red-bordered box containing a purple 'OK' button.

### Step 5: Sign the Documents.

- Scroll down to review the document.
- Click on **Jump to next signature item** to go to signature line of document.
- The signature line will be in red. Click on **SIGN HERE** to insert the electronic signature.

LOAN OFFICER - 1003 APPLICATION 1 Print Help

---

To be completed by the Lender:  
 Lender Loan No./Universal Loan Identifier: 531009 / 5493003V40VGM7YDFM5453100921 Agency Case No. \_\_\_\_\_

#### Uniform Residential Loan Application

Verify and complete the information on this application. If you are applying for this loan with others, each additional Borrower must provide information as directed by your Lender.

**Section 1: Borrower Information.** This section asks about your personal information and your income from employment and other sources, such as retirement, that you want considered to qualify for this loan.

**1a. Personal Information**

<p style="font-size: x-small; margin: 0;">Name (First, Middle, Last, Suffix) NON-QM N TEST, JR</p> <p style="font-size: x-small; margin: 0;">Alternate Names – List any names by which you are known or any names under which credit was previously received (First, Middle, Last, Suffix)</p> <p style="font-size: x-small; margin: 0;">Type of Credit  <input checked="" type="radio"/> I am applying for individual credit.  <input type="radio"/> I am applying for joint credit. Total Number of Borrowers: _____                      Each Borrower intends to apply for joint credit. Your initials: _____</p> <p style="font-size: x-small; margin: 0;">Marital Status  <input type="radio"/> Married  <input type="radio"/> Separated  <input checked="" type="radio"/> Unmarried                      (Single, Divorced, Widowed, Civil Union, Domestic Partnership, Registered Reciprocal Beneficiary Relationship)</p> <p style="font-size: x-small; margin: 0;">Current Address                      Street 1246 MATHEUS DRIVE Unit # _____                      City Murfreesboro State TN ZIP 37128 Country USA                      How Long at Current Address? 3 Years 7 Months Housing <input type="checkbox"/> No primary housing expense <input type="checkbox"/> Own <input checked="" type="checkbox"/> Rent (\$ 3,500.00 /month)</p>	<p style="font-size: x-small; margin: 0;">Social Security Number 500 - 50 - 7000                      (or Individual Taxpayer Identification Number)</p> <p style="font-size: x-small; margin: 0;">Date of Birth (mm/dd/yyyy) 07 / 04 / 1966</p> <p style="font-size: x-small; margin: 0;">Citizenship  <input checked="" type="radio"/> U.S. Citizen  <input type="radio"/> Permanent Resident Alien  <input type="radio"/> Non-Permanent Resident Alien</p> <p style="font-size: x-small; margin: 0;">List Name(s) of Other Borrower(s) Applying for this Loan                      (First, Middle, Last, Suffix) – Use a separator between names</p> <p style="font-size: x-small; margin: 0;">Contact Information                      Home Phone ( 818 ) 222 - 2222                      Cell Phone ( 818 ) 444 - 1234                      Work Phone ( ___ ) ___ - _____ Ext. _____                      Email ryanm@firstcolonymortgage.com</p>
--	---

Jump to next signature item
View next document to be signed
Return to document list

Signature Items Remaining On This Document 1 Currently signing as: Loan Officer  
Click-Sign Documents Remaining: 2 / 2

#### Section 9: Loan Originator Information. To be completed by your Loan Originator.

**Loan Originator Information**

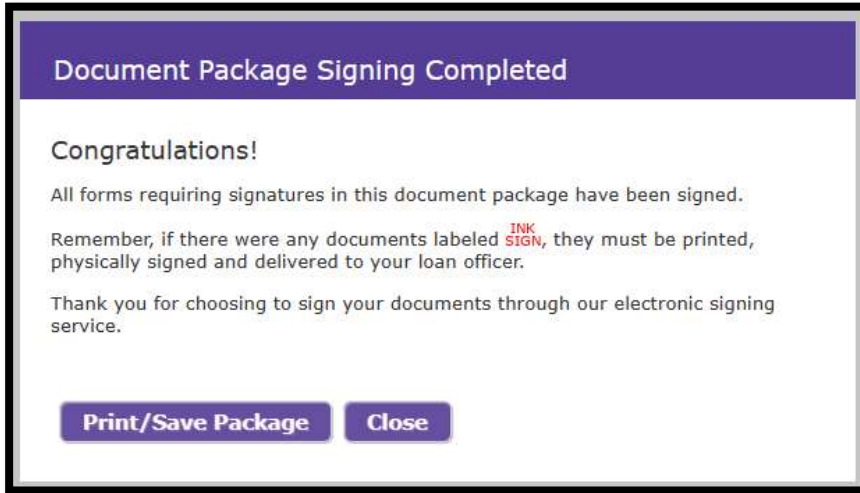
Loan Originator Organization Name Bean TPO Test Company	
Address 123 Test Street, Murfreesboro, TN 37129	
Loan Originator Organization NMLSR ID# 123456	State License ID# _____
Loan Originator Name Ryan Wholesale-LO	
Loan Originator NMLSR ID# 385678	State License ID# 12345
Email ryan.mccormick+874623763@ghmc.com	Phone ( 615 ) 895 - 5101
Signature <span style="border: 2px solid red; padding: 5px; display: inline-block; text-align: center; color: white; font-weight: bold;">SIGN HERE</span>	Date (mm/dd/yyyy) 02/23/2024

Jump to next signature item
View next document to be signed
Return to document list

1

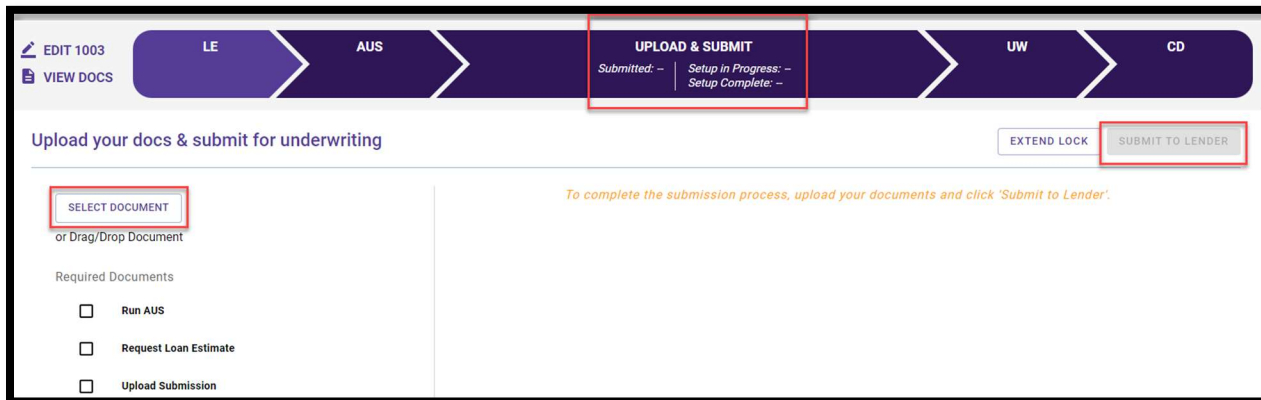
### Step 6: Complete signing the package.

- Once all documents have been signed/acknowledged the Broker will see a notification stating the document package signing has been completed.
- Click on **Print/Save Package** or **Close**.



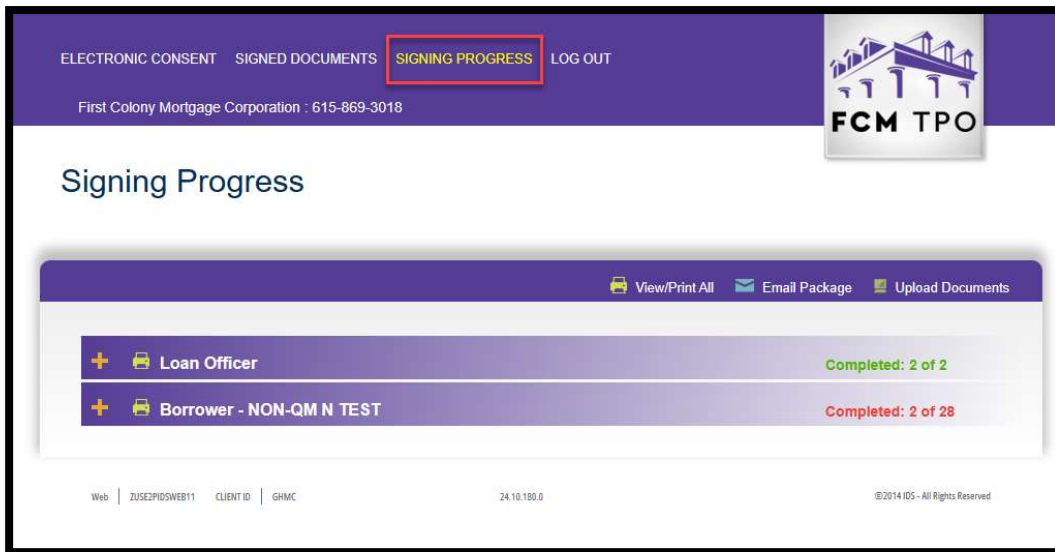
### Step 7: Upload Remainder of Loan Package.

- The remainder of the loan package will need to be uploaded into G Connect.
  - From within the loan, click on the **Upload and Submit** tab on the Loan Tracker.
  - Click on **Upload Document** or drag and drop the documents into the screen.
  - Click on **Submit to Lender**.



## Step 8: Viewing the Status of the Signing Process

- To view the status of the Signing Process, click on the link provided in the email that was initially received from IDS.
- After you have signed into IDS, Click on **Signing Process**.



ELECTRONIC CONSENT SIGNED DOCUMENTS **SIGNING PROGRESS** LOG OUT

First Colony Mortgage Corporation : 615-869-3018

**FCM TPO**

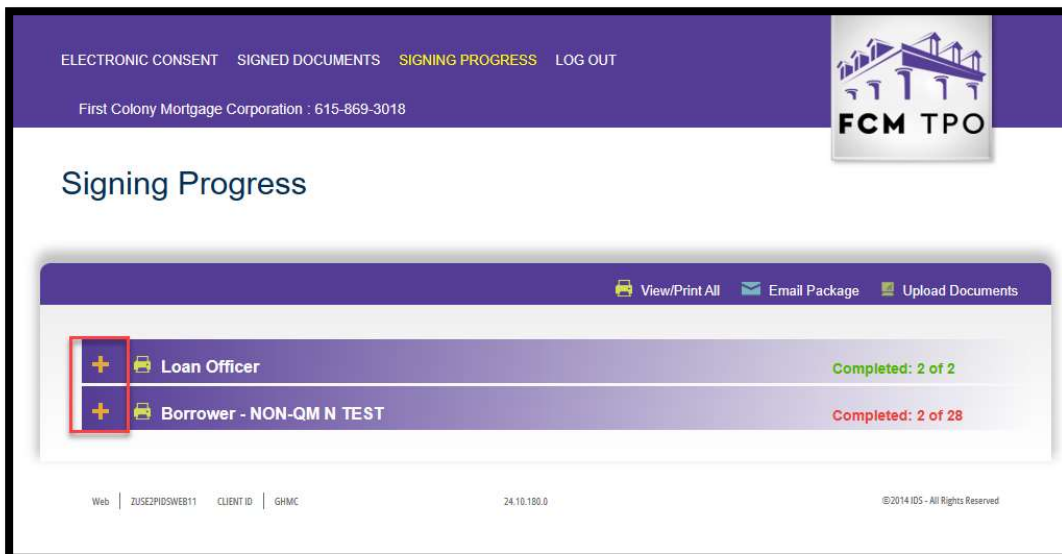
### Signing Progress

View/Print All Email Package Upload Documents

+ Loan Officer	Completed: 2 of 2
+ Borrower - NON-QM N TEST	Completed: 2 of 28

Web | ZUSE2PIDSWEB11 CLIENT ID | GHMC 24.10.180.0 ©2014 IDS - All Rights Reserved

- To view the remaining documents that need to be signed by the Loan Officer or the Borrower(s), expand the lists by clicking on the + symbol.



ELECTRONIC CONSENT SIGNED DOCUMENTS **SIGNING PROGRESS** LOG OUT

First Colony Mortgage Corporation : 615-869-3018

**FCM TPO**

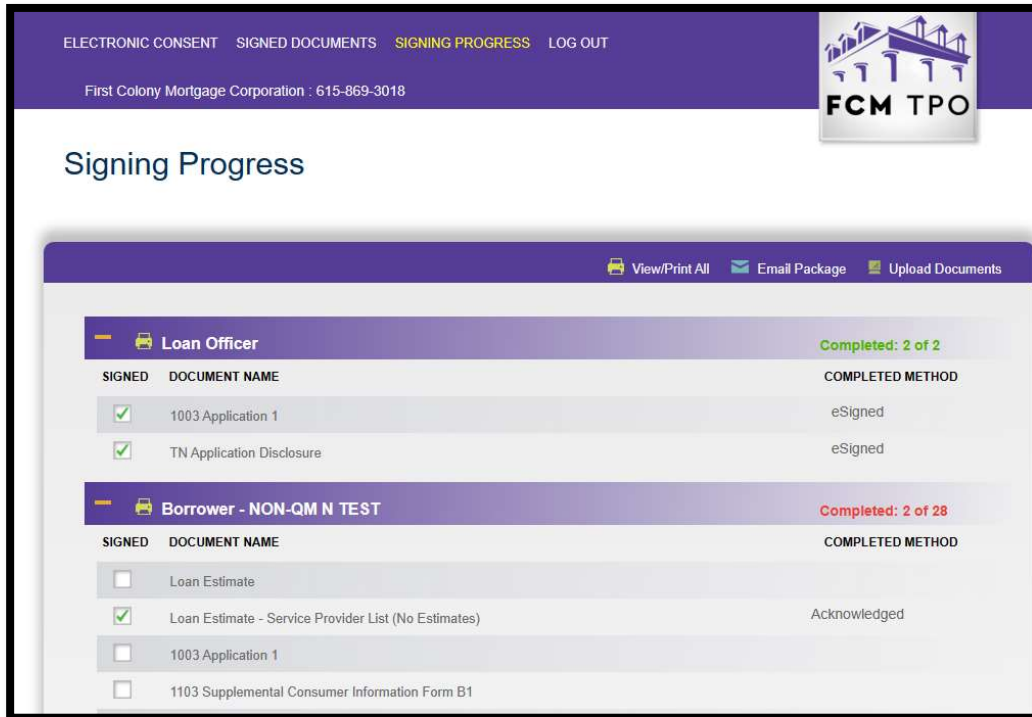
### Signing Progress

View/Print All Email Package Upload Documents

+ Loan Officer	Completed: 2 of 2
+ Borrower - NON-QM N TEST	Completed: 2 of 28

Web | ZUSE2PIDSWEB11 CLIENT ID | GHMC 24.10.180.0 ©2014 IDS - All Rights Reserved

- The lists will show you which documents have been signed/acknowledged and which documents still need to be completed.



ELECTRONIC CONSENT   SIGNED DOCUMENTS   **SIGNING PROGRESS**   LOG OUT

First Colony Mortgage Corporation : 615-869-3018

**FCM TPO**

## Signing Progress

View/Print All   Email Package   Upload Documents

**Loan Officer**   Completed: 2 of 2

SIGNED	DOCUMENT NAME	COMPLETED METHOD
<input checked="" type="checkbox"/>	1003 Application 1	eSigned
<input checked="" type="checkbox"/>	TN Application Disclosure	eSigned

**Borrower - NON-QM N TEST**   Completed: 2 of 28

SIGNED	DOCUMENT NAME	COMPLETED METHOD
<input type="checkbox"/>	Loan Estimate	
<input checked="" type="checkbox"/>	Loan Estimate - Service Provider List (No Estimates)	Acknowledged
<input type="checkbox"/>	1003 Application 1	
<input type="checkbox"/>	1103 Supplemental Consumer Information Form B1	

Should you have any questions during this process, you can contact the Initial Docs Dept at 615-869-3000 or [disclosures@fcmtpo.com](mailto:disclosures@fcmtpo.com).