



Pacific Trust Deed Servicing Co., Inc.

Phone: (541) 955-6672 * Fax: (541) 955-6673

P.O. Box 697 * Grants Pass, OR 97528 * 225 N.E. "C" Street, Grants Pass, OR 97526

PACIFIC TRUST DEED SERVICING COMPANY, INC. DOCUMENT WORKSHEET

STANDARD SET-UP FOR NOTE & TRUST DEED

1. Collection Escrow Instructions
 - *Please include all contact information; cell phones, email, etc.
 - *Banking Information for auto deposit - must complete ACH credit form & include voided check
 - *Banking Information for auto withdrawal - must complete ACH debit form & include voided check.
 2. Exhibit "A" - Collection of Late Charges - if requested
 3. Exhibit "B" - Tax and/or Insurance Reserve Account Agreement - if requested
 - *Property Taxes - Include Property Tax Statement
 - *Fire Insurance - Include Fire Insurance Binder
 4. ORIGINAL Note
 5. ORIGINAL Recorded Trust Deed
 6. ORIGINAL Assignment of Trust Deed (If Applicable)
 7. ORIGINAL Request for Reconveyance signed by all Beneficiaries
 - *Partial Reconveyance required for multiple properties and release provisions
 8. Trustee's Certification Statement (If Applicable)
 9. Power of Attorney or Personal Representative Verification (If Applicable)
 10. W-9 for All Parties; husband AND wife
 - *LLCs and corporations please provide tax identification numbers
 - *LLCS please provide a copy of the Operating Agreement
 - *Corporations please provide Bylaws and Shareholder Resolution
 11. Fee Schedule (Initialed by Each Party)
 12. Privacy Policy (Initialed by Each Party)
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If you have any questions please call 541-955-6672