

# REQUEST FOR CO-OP COLLATERAL

## **Required Items — Please Read Carefully:**

The following items are required and must be mailed or faxed to one of the firms chosen from the attached CO-OP Representative Information sheet:

### **CO-OP Request Worksheet**

This must be completed and signed by the person requesting the collateral documents on behalf of the borrower(s).

### **Authorization to Release Information and CO-OP Fee Disclosure**

This must be signed by all the borrowers on the Stock Certificate.

### **Proposed Closing Date**

If you have a closing date, please provide that information on the attached form.

Please submit all items listed in the instructions to one of the selected firms provided on the CO-OP Representative Information page.

If your transaction has circumstances such as a lock-in expiration, rate expiration, funding issues, etc. that can be compromised due to the length of time it may take to secure your original documents, please plan accordingly by consulting with your selected CO-OP Representative.

Incomplete packages will not be processed. Transactions that require affidavits may require more processing time.

**Please allow a minimum of 45 days for processing completed packages. *Initial to acknowledge:* \_\_\_\_\_**

## **CO-OP REQUEST WORKSHEET**

### **BORROWER INFORMATION**

Current Loan Number: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Borrower Name(s): \_\_\_\_\_

Borrower Name(s): \_\_\_\_\_

Property Address: \_\_\_\_\_

Purpose of Transaction:

- Refinance
- Sale
- Modification to Collateral

### **CLOSING AGENT / REPRESENTATIVE INFORMATION**

*Please provide the complete mailing address. PO boxes will not be accepted.*

Closing Agent / Representative Name:

\_\_\_\_\_

Closing Agent / Representative Address:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Closing Agent / Representative Phone Number:

\_\_\_\_\_

Closing Agent / Representative Fax Number:

\_\_\_\_\_

Closing Agent / Representative Email Address:

\_\_\_\_\_

Proposed Closing Date:

\_\_\_\_\_

## **REQUESTOR'S STATEMENT**

I represent that the borrower(s) has/have authorized me to request the original collateral file for the above-referenced loan on his/her/their behalf. I have reviewed the information contained above and represent that it is true and accurate. I understand that Bank of America, N.A., is retaining a firm to hold the appropriate collateral file documents and to represent Bank of America, N.A., in connection with the CO-OP transaction. The firm charges a fee of \$475 for these services and the fees are due at closing. I agree to cooperate with Bank of America, N.A., and their representatives in the CO-OP transaction. I understand the fees are due at closing and the representative will not release the Stock Certificate, Proprietary Lease, or any of the documents from the collateral file until the firm has been paid his/her fee and lien holder has been paid in full.

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Requestor's Name

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Phone Number

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Fax Number

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Requestor's Signature

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Date

CO-OP DEPARTMENT provided by Bank of America, N.A.

**AUTHORIZATION TO RELEASE INFORMATION AND CO-OP FEE DISCLOSURE**

I/we (referred to as "borrower," "I," "me" or "my" herein) acknowledge and agree that I am requesting Bank of America, N.A., to provide the original collateral file for my mortgage to a new lender. Bank of America, N.A., is retaining a representative to hold the collateral file documents and to represent Bank of America, N.A., in the CO-OP transaction. I agree to pay the firm a \$475 fee for their services. The fee will not be included in the payoff amount. However, the unpaid balance of the fee will be collected at closing and must appear on the Settlement Statement.

Borrower authorizes Bank of America, N.A., and their representative, to provide information about my loan to the new lender, the broker, if any, the closing attorney, my attorney, if any, and any other parties requesting information in connection with the CO-OP transaction. Further, I agree to indemnify, defend and hold Bank of America, N.A., and their respective affiliates, subsidiaries, parent company, representatives, agents, officers, directors, employees, contractors, attorneys, shareholders, investors, predecessors, successors and assigns harmless from and against any claims, penalties, losses, damages, expenses and costs relating to Bank of America, N.A., or their attorney providing information about my loan in accordance with this authorization.

\_\_\_\_\_  
Borrower's Printed Name

\_\_\_\_\_  
Borrower's Printed Name

\_\_\_\_\_  
Borrower's Signature

\_\_\_\_\_  
Borrower's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

CO-OP DEPARTMENT provided by Bank of America, N.A.

## **CO-OP REPRESENTATIVE INFORMATION**

To request the original collateral file of a current loan to be sent to a new lender in connection with a CO-OP transaction, please follow the following procedures:

- Contact one of the representatives listed below directly; and
- Provide the required items and worksheet to the representative

Once a request has been made, the selected representative will be your contact throughout the process.

### **Fentin, Goldman, Turk & Davidoff, LLP**

Attn: Gary Goldman  
120 Bloomingdale Road, Suite 308  
White Plains, NY 10605  
914.220.4400

Debbie Matthews  
DMatthews@FentinGoldman.com  
914-220-4458

### **Fentin, Goldman, Turk & Davidoff, LLP**

Attn: Gary Goldman  
270 Madison Avenue, Suite 1500  
New York, NY 10016  
212.265.4900

Debbie Matthews  
DMatthews@FentinGoldman.com  
914-220-4458