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**Financial & Corporate Compliance**

## **What's New with Documents**

ComplianceOne<sup>®</sup> assumptions

May 2025

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# Financial & Corporate Compliance

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# Contents

<b>What's New</b> .....	<b>4</b>
Louisiana Authentic Act and Georgia Attestation content .....	4
• Assignment Leases and Rents .....	4
• Assignment of Real Estate Security Instrument.....	4
• Assumption Agreement .....	4
• Partial Release of Real Estate Security Instrument.....	4
• Request for Notice (CA).....	4
• Subordination Agreement Real Estate Lien .....	4
Multi-State .....	4
Automatic Transfer Authorization Plain Language.....	4
Important Applicant Information .....	4
Request for Transcript of Tax Return IRS 4506C IVES.....	4
Iowa.....	5
Motor Vehicle Title Application-IA .....	5
New Mexico.....	5
Choice of Insurance Notice.....	5
New York.....	5
Motor Vehicle Title Notification-NY .....	5
Flood Insurance Disclosure-NY .....	5
South Carolina.....	5
Notice of Agency to Receive Complaints-SC.....	5
South Dakota.....	6
Partial Release of Real Estate Security Instrument .....	6
Wisconsin .....	6
Application Disclosure .....	6

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# What's New

## Louisiana Authentic Act and Georgia Attestation content

Louisiana Authentic Act and Georgia Attestation content now always iterates by signing party whenever such a notarial act is required. Each iterated notary block is now mapped to the specific signer which it applies to, including the Link to Signer Identifier element and signer-specific notary data (e.g., Notary State or Notary Public Name).

Louisiana Authentic Act, and Georgia Attestation content where applicable, has been removed from the Collateral Document Georgia Louisiana Notary, Collateral Document Louisiana Notary - For Witness Lines, and Other Document Georgia Louisiana Notary sections of the Acknowledgment. The following documents are impacted by this change.

- Assignment Leases and Rents
- Assignment of Real Estate Security Instrument
- Assumption Agreement
- Partial Release of Real Estate Security Instrument
- Request for Notice (CA)
- Subordination Agreement Real Estate Lien

## Multi-State

### Automatic Transfer Authorization Plain Language

Updated the *Automatic Transfer Authorization Plain Language* document so the Maintenance Transfer of Funds section prints only when the disclosure involves transfer of funds maintenance if the Military Lending Act does not apply.

### Important Applicant Information

Updated the *Important Applicant Information* document to add the previously removed *Date and Parties* sections and to adjust the second opening paragraph and remove the text "Any identifying information collected is used solely for this purpose and will be kept confidential".

### Request for Transcript of Tax Return IRS 4506C IVES

Updated the *Request for Transcript of Tax Return IRS 4506C IVES* document to add the following new prompts to enhance the collection of a non-party business to the transaction:

- First Filer BMF Company Name
- First Filer Address Street/City/State/Postal Code
- First Filer Phone Number

Additionally, revised the signature area and associated checkboxes to look for the *Signer* for the *First Filer*.

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## Iowa

### Motor Vehicle Title Application-IA

Revised the *Motor Vehicle Title Application-IA* document to follow the model form. Minor content changes have been made to the paragraph in the *Owner Information* section. In the *Vehicle Information* section, the *Style* option has been removed. In the *Purchase Price* section, content changes have been made to the authorization checkboxes. Additionally, the checkbox related to the county has been updated so the box can be checked to authorize the application without having to provide a county. On page three, a prompt has been added to collect any additional instructions or explanations needed for the application.

## New Mexico

### Choice of Insurance Notice

Updated the *Choice of Insurance* document to remove New Mexico from the document selection rules.

## New York

### Motor Vehicle Title Notification-NY

Revised the *Motor Vehicle Title Notification-NY* document to follow the model form. Minor content changes have been made to the checkbox regarding a new address since the last title issued. The signature layout has been updated. In the *Lien Information* section, the street address has been updated to the mailing address. Other minor changes have been made throughout the form as well.

### Flood Insurance Disclosure-NY

Updated the *Flood Insurance Disclosure-NY* document to remove part of the language mentioning that the flood insurance will only protect the creditor or lender's interest in the property.

## South Carolina

### Notice of Agency to Receive Complaints-SC

Updated the *Notice of Agency to Receive Complaints* to also select for consumer home loans when a structure designed to be principally occupied from one to four families is to be located upon the property being mortgaged per South Carolina Code Sections 37-23-70(D) and 37-23-20(4). Currently, the form only selects if the principal dwelling is already located upon the property and occupied by the borrower. However, the regulatory requirement also requires the form be provided for properties upon which a principal dwelling is to be constructed or a mobile home that is a principal dwelling is to be set as part of the transaction. Thus, the selection rules are being updated accordingly.

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## South Dakota

### Partial Release of Real Estate Security Instrument

Updated the output format for the rule that prints the time the document was recorded to print the time portion of the data.

## Wisconsin

### Application Disclosure

Revised the *Application Disclosure* to include the WI specific items from Wis. Adm. Code § DFI-BKG 43.02(11).

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