

Financial & Corporate Compliance

# What's New with the Documents

ComplianceOne® mortgage

June 2023

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## What's New

### MULTI-STATE

#### Automatic Transfer Authorization Plain Language

The Automatic Transfer Authorization Plain Language has been updated to show Quarterly Periodic Transfer within Section - "Periodic Transfers".

#### Closing Instructions

The Closing Instructions document has been added to be used in the application. It can be viewed by selecting the "Include Closing Instructions Document" checkbox on the Document Data page.

#### Request for Verification of Rent or Mortgage

The Request for Verification of Rent or Mortgage has been updated to show only those debts that have been checked as "Verify Debt" within Document Data page.

### INDIANA

#### Property Tax Benefits-IN

Property Tax Benefits-IN has been updated with a revision date of 1/2023. Within the "Supplemental Homestead Deduction" and "Heritage Barn" rows in the "Application Form" column, hardcoded text changes have been made.

Within the "Homestead Standard Deduction" row, the maximum dollar amount has changed from \$45,000 to \$48,000, and hardcoded text changes have been made within the "Application Form" column.

The "Mortgage" row has been removed and a new row for "Fertilizer & Pesticide Storage" has been added.

### NEW JERSEY

#### Lock In Agreement-NJ

The layout of the fees table of the Lock In Agreement-NJ was updated to correct spacing and add formatting. Also, "New Jersey" has been added to the document title.

### VIRGINIA

#### Choice of Settlement Agent Notice-VA

Choice of Settlement Agent Notice-VA has been updated to include additional text: "No settlement agent may collect any fees from a represented seller payable to the settlement agent or its subsidiaries, affiliates, or subcontractors without first obtaining the written consent of the seller's counsel." within Section "Main Notice".

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