#### **Learning & Development**



Requirements Documents to Close in a Trust

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# **Closing in a Trust**

Closing in a trust requires one of the following combinations of documents. All documents are needed Prior to Approval, including Notarization - <u>No exceptions</u>.

# 1. Option A:

- a. Trust Certification.
- b. Title Email Authorization they can close in a trust.

### 2. Option B:

- a. Trust Agreement.
- b. **Title Email Authorization** they can close in a trust.
- c. Attorney Opinion Letter.

## Need help?

- Wholesale Support **(855) 399-6242**
- Resource Library