

Quick Reference Guide



First Reliance Mortgage Quick Reference Guide:

1. Login to <https://firstreliance.mortgagebotlos.com/login>.
2. **Loan Questions:** Email any of our underwriters or your Account Executive
3. **How Do I Add Loans to My Pipeline?** Review the *Job Aid – How To Import and Register A Loan File*
4. **How Do I Submit a Loan File for AUS (DU or LPA)?** Review the *Job Aid – How To Submit A Loan File to AUS (DU or LPA)*
5. **How Do I Lock an Interest Rate?** Review the *Job Aid – How To Lock an Interest Rate*
6. **How do I Submit Loan Documents?** Review the *Job Aid – How to Upload Loan Documents*
7. **How Do I Schedule My Loan Closing?**
 - a. Please email your closer to tentatively set up your closing, at least **2 weeks** prior to anticipated closing date.
 - b. Complete the closing request Form (found in the Resource Center).
 - c. Image this form along with all required closing documents.
 - d. Use the Link for “Imaging” “Upload Document” on website
 - e. Verify you are uploading to the correct loan. Choose document type “CW-Closing Request “
 - f. Click “Submit”
 - g. You must upload your Approval and Closing Documents **5 business days** prior to your closing date so we have time to issue the Closing Disclosure.
8. **How Do I Submit a Correspondent Loan File for Purchase?**
 - a. Complete the Purchase Transmittal form found in the Resource Center.
 - b. Use the Link for “Imaging” “Upload Document” on website
 - c. Verify you are uploading to the correct loan. Choose document type “CW-Purchase Package Deliver”
 - d. Click “Submit”
 - e. Correspondents, please make sure you have First Reliance’s Mortgagee Clause on all insurance documents prior to uploading your Purchase package request.
9. **Important Note:** Remember to use the following address for line 5 of your 4506T/C
 - a. *Equifax Workforce Solutions, LLC, 11432 Lackland Rd., St. Louis, MO 63146*

Title Mortgagee Clause

FIRST RELIANCE BANK, ISAOA/ATIMA
2170 WEST PALMETTO STREET
FLORENCE, SC 29501

Conventional Mortgage Hazard Mortgagee Clause

FIRST RELIANCE BANK, ISAOA/ATIMA
PO BOX 961292
FORT WORTH, TX 76161-0292

Govt. / Jumbo Hazard Mortgagee Clause

FIRST RELIANCE BANK, ISAOA/ATIMA
900 JOHNNIE DODDS BLVD, 200
MOUNT PLEASANT, SC 29464

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