

How to Update Fees on TRID Loan Estimate Fee Schedule

Regular Assessments: these fees are found on the Lender Questionnaire templates.

- Go to Manage Associations > Association Data
- Select the Association from the dropdown
- Scroll down to the Assessments and Budget Information section
- Update the Regular Assessment amount(s) and click Save Changes

Special Assessments: these fees are found on the Lender Questionnaire templates.

- Go to Manage Associations > Association Data
- Select the Association from the dropdown
- Scroll down to the Homeowner Information section
- Update the Special Assessment information and click Save Changes

Other Fees (Transfer Fee, Capital Contribution, Move In Fee, etc.):

- If these fees require any changes or more need to be added, please submit the request to cmsupport@homewisedocs.com

Other Developer Fees (for New Home Sales):

- If these fees require any changes or more need to be added, please submit the request to cmsupport@homewisedocs.com

Comments:

- Go to Manage Associations > TRID Comments *NEW*
- Select the Association from the dropdown
- Scroll down to the bottom section
- Enter/Update the Comments in the General Comments box
- Click the Save Comments button



TRID Loan Estimate Fee Schedule

for

Lakecliff on Lake Travis Property Owners Association

The following information is provided by Goodwin & Company to assist you in completing the Loan Estimate. This form lists all available products for the Association and should not be considered a recommendation of what to obtain for your real estate/financing transaction. Identify the items you will order and enter the corresponding fees on the Loan Estimate.

Required Payments	Fee	When Paid
Refi Admin Fee	\$195.00	At Close
Regular Assessment Amount	\$1,020.00 - \$2,151.71	Annually
Transfer Fee	\$275.00	At Close
Compliance Packages	Fee	When Paid
Inspection Form ONLY The management company performs an on-site inspection of the subject property to determine if the current owner has any violations of the association rules, policies or architectural guidelines. If so, a new owner could be responsible for remedying these violations. Products included, if they pertain to the Association: Inspection Form	\$150.00	Up Front
Premier Resale Certificate Package PLUS the Statement of Account and Inspection This bundle includes all disclosures and association documents necessary for closing. This package also includes an inspection. Products included, if they pertain to the Association: Contact Information Sheet Insurance Dec Page Litigation Reserve Report Rules, Resolutions, and Policies Resale Certificate/Statement of Account Inspection Form Articles of Incorporation Budget Bylaws Design Document CCRs Current Unaudited Financial Documents Special Assessments Welcome to Goodwin Company	\$525.00	Up Front

<p>Premium Lender Questionnaire Bundle (Best Value!) EVERYTHING your underwriter needs to quickly underwrite the subject property. Products included, if they pertain to the Association: Insurance Dec Page Lender Questionnaire Litigation Reserve Report Rules, Resolutions, and Policies Articles of Incorporation Budget Bylaws Design Document CCRs Current Unaudited Financial Documents Special Assessments</p>	<p>\$375.00</p>	<p>Up Front</p>
<p>Refinance Statement of Account Only Statement of a unit holders financial and legal status. A clear certificate means no arrears. Products included, if they pertain to the Association: Refinance Statement of Account</p>	<p>\$95.00</p>	<p>Up Front</p>
<p>Resale Certificate Package PLUS the Statement of Account This bundle includes all disclosures and association documents necessary for closing. Products included, if they pertain to the Association: Contact Information Sheet Insurance Dec Page Litigation Reserve Report Rules, Resolutions, and Policies Resale Certificate/Statement of Account Articles of Incorporation Budget Bylaws Design Document CCRs Current Unaudited Financial Documents Special Assessments Welcome to Goodwin Company</p>	<p>\$375.00</p>	<p>Up Front</p>
<p>Standard Lender Questionnaire Bundle Minimum documentation for underwriting the subject property. For most comprehensive package, please see Premium Lender Bundle above. Products included, if they pertain to the Association: Insurance Dec Page Lender Questionnaire Budget</p>	<p>\$325.00</p>	<p>Up Front</p>
<p>Individual Disclosure Forms and Association Documents</p>	<p>Fee</p>	<p>When Paid</p>
<p>Lender Questionnaire</p>	<p>\$275.00</p>	<p>Up Front</p>
<p>Statement of Account-Owner Balance Only</p>	<p>\$175.00</p>	<p>Up Front</p>
<p>Additional Fees (Optional)</p>	<p>Fee</p>	<p>When Paid</p>
<p>CD Delivery Fee</p>	<p>\$30.00</p>	<p>Up Front</p>

Credit Card Convenience Fee (for credit card payments only)	\$6.00	Up Front
Custom Questionnaire Fee (*Add this fee to Questionnaire Fee)	\$100.00	Up Front
Custom Questionnaire Rush Fee (*Add this fee to Questionnaire Rush Fees)	No Cost	No Cost
Inspection Form 1 business days Rush Fee	\$350.00	Up Front
Inspection Form 3 business days Rush Fee	\$250.00	Up Front
Inspection Form 5 business days Rush Fee	\$150.00	Up Front
Inspection Form 7 business days Rush Fee	\$100.00	Up Front
Lender Questionnaire 1 business days Rush Fee	\$350.00	Up Front
Lender Questionnaire 3 business days Rush Fee	\$250.00	Up Front
Lender Questionnaire 5 business days Rush Fee	\$150.00	Up Front
Lender Questionnaire 7 business days Rush Fee	\$100.00	Up Front
Lender Questionnaire Update from 1 to 30 days	\$25.00	Up Front
Multi-Product Order 1 business days Rush Fee	\$350.00	Up Front
Multi-Product Order 3 business days Rush Fee	\$250.00	Up Front
Multi-Product Order 5 business days Rush Fee	\$150.00	Up Front
Multi-Product Order 7 business days Rush Fee	\$100.00	Up Front
Refinance Statement of Account Update from 1 to 14 days	No Cost	No Cost
Refinance Statement of Account Update from 15 to 45 days	No Cost	No Cost
Refinance Statement of Account Update from 46 to 90 days	No Cost	No Cost
Resale Certificate/Statement of Account 1 business days Rush Fee	\$350.00	Up Front
Resale Certificate/Statement of Account 3 business days Rush Fee	\$250.00	Up Front
Resale Certificate/Statement of Account 5 business days Rush Fee	\$150.00	Up Front
Resale Certificate/Statement of Account 7 business days Rush Fee	\$100.00	Up Front
Resale Certificate/Statement of Account Update from 1 to 14 days	No Cost	No Cost
Resale Certificate/Statement of Account Update from 15 to 45 days	No Cost	No Cost
Resale Certificate/Statement of Account Update from 46 to 90 days	No Cost	No Cost
Rush Existing Order (*Add this fee to Rush Fees)	\$25.00	
Statement of Account-Owner Balance Only 1 business days Rush Fee	\$150.00	Up Front
Statement of Account-Owner Balance Only 3 business days Rush Fee	\$100.00	Up Front

Statement of Account-Owner Balance Only 5 business days Rush Fee	\$50.00	Up Front
Statement of Account-Owner Balance Only Update from 1 to 90 days	No Cost	No Cost
Three Day Shipping Fee	\$45.00	Up Front
TRID	Fee	When Paid
TRID-List of Fees and Charges (NOT TO BE USED FOR CLOSING)	No Cost	No Cost

Loan Estimate Disclaimer: Fees vary by association and individual units and cannot be finalized until the closing of a transaction. Fees including, but not limited to, Regular Assessment Amount, Special Assessments, Transfer Fees, Capital Contributions, Move In Fees, Collection Fees, etc. may be assessed to each property and will be finalized on the Closing Disclosure. Please work with the Closing Agent to obtain these exact fee amounts.

All fees are subject to change without notice and can only be finalized at the time a transaction is prepared to close and the Closing Disclosure is completed.

Comments: