



Padgett Law Group Client Onboarding Form Questionnaire Reference Document

This document is for desktop reference only. The PLG on-board questionnaire form can be completed online in three parts at [Padgettlawgroup.com/onboard](https://padgettlawgroup.com/onboard). You can complete the questionnaire at one time or split into three separate submissions completed by one or more individuals. To onboard with PLG and receive an engagement letter or custom pricing, Part One, at a minimum must be completed. If you have any questions, need assistance, or would like to schedule a call to complete the form with a PLG representative, please reach out to compliance@padgettlawgroup.com or marketing@padgettlawgroup.com and we will gladly assist you. Note that some questions online may vary slightly from this form. This form is for reference only. Thank you for choosing PLG.

Client Info

Client Name: _____

Corporate Address: _____

Telephone No.: _____

Fax No.: _____

Contract

Contract/LSA/Engagement Letter in place/received?: Yes No

Type: _____

If yes, effective date: _____

Counter-signed copy received?: Yes No

Expiration Date (if any): _____

Expiration Details (auto-renewal?, etc.): _____

Accounting & Financial Operations

Billing Schedule Followed: FNMA and applicable investor schedules Custom

Fee Approval Required for items over allowable: Yes No

Invoicing System: Email - provide inbox or preferred contact(s) _____



- BKFS LoanSphere IM iClear Serengeti
 Corridor CounselLink TyMetrix ResNet
 Other
-

Invoices should be directed to (Client, loan's investor, or other): _____

Payment Method (ACH, check, etc. – if ACH, please provide form): _____

Compliance

Client Contact/Oversight: _____

Monthly Reporting Requirements: _____

Notification Requirements & Contact - Data Breach, Litigation Against Firm, etc.: _____

Scorecard? Yes No

Frequency? _____

Metrics: _____

Rebuttals Process? No Yes _____

Vendor Management

3rd Party - Vendor Approval Required? Yes No

If yes, please provide Contact and Process (inbox if any) _____

Operations



Communication Platform: BKFS LoanSphere DM VendorScape Tempo
 Other _____

Email – if email, please provide a contact matrix when returning this form

SCRA and PACER Milestones: _____

Calendar or Business Days

SCRA and PACER Parties requiring searches:

Borrower Mortgage-Only Signor Vested Owner

SCRA and PACER Naming Permutations, if any: _____

Client Approval Required on Pleadings prior to filing? Yes No

Would you like any type of monthly status report? If so, please provide parameters and recipients:

Firm to prepare demand letter? Yes (\$150 and prepared in limited circumstances) No

Title

Title Process & Vendors _____

AOM - Firm Prepares (\$50) Client Prepares

AOM - approval for firm to proceed without in states where possible? Yes No



Litigation

Policy & Procedure including any contacts and preferred communications _____

Transfers

Approval to proceed in the event a transfer file is received? Yes No

Reinstatement & Payoff

Firm to prepare? Yes (\$150) No

Figures expiration timeline? _____

State-specific Requirements

Georgia - Please provide name, phone number, and address to be listed in Notice of Acceleration pursuant to statutory law. _____
