



Independent Note & Contract Services, LLC

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NEW ACCOUNT CHECKLIST

Below is a complete list of the forms needed to set up a new account with INCS. Accounts can be set up by any party to the transaction, as long as the required documentation is provided and agreed upon by all parties.

Required Documentation for All Accounts:

We will need the following from all parties of the loan:

- Service Agreement with Terms of Service Acknowledgment
- W-9
- Copies of the executed contractual documentation

Optional Services:

True Escrow Account: If you would like INCS to hold the original documentation for your loan, we will need:

- True Escrow Agreement signed by Lender
- ALL original documentation
- Request for Reconveyance (can be generated by INCS if not provided at closing)

Impound or Reserve Account: If you would like INCS to pay the property taxes, insurance premium, and/or homeowner dues, we will need:

- Reserve Checklist
- Copy of the insurance policy or binder
- Copy of a recent property tax statement
- Copy of homeowner association/dues statement

Please complete, sign and return all the appropriate forms and documents to our office and allow 1-2 business days for account setup. You may send your new account paperwork by:

- E-mail to: Staff@INCSNoteServices.com
- Fax: to (360) 336-3488 |If sent by fax, please call or email the office to verify delivery
- Secure Upload at our website: <http://incsnoteservices.com/electronic-upload/>
- Mail or In-Person to: INCS, 1204 Cleveland Avenue, Mount Vernon, WA 98273

If you have any questions, please give our office a call at (360) 336-5213.

We look forward to working with you!