



New Setup Checklist-CA

California Franchise Tax Board Compatible

Welcome to Evergreen Note Servicing!

We are pleased you have chosen to do business with us. No other account servicing company offers such easy access to information, leading-edge technology and personalized customer service.

To activate your new account, please return the following documents:

REQUIRED DOCUMENTATION:

- Completed Account Servicing Agreement (enclosed)
- IRS Form W-9 (to be completed by all parties)
- Documents (Originals or Copies)
 - a. Promise Document (Note, Contract, Rental/Lease Agreement, etc.)
 - b. Security Document (Deed of Trust, Mortgage, etc.)
 - c. Release Documents (Signed Request for Reconveyance, Deed, etc.)
- Set up Fee

DOCUMENTATION NEEDED FOR ADDED SERVICES:

- California Franchise Tax Board (FTB) Real Estate Withholding:
 - Completed and signed by Seller/Transferor *and* Buyer/Transferee – Current Year FTB Form 593 (Real Estate Withholding Statement)
- Completed Impound Addendum (enclosed) – required to establish reserves/impounds for taxes, insurance, etc.
 - Recent tax bill
 - Legal description of the property
 - Copy of the insurance policy or binder
 - Impound Account Set up fee
- Prior Lien Addendum (enclosed) – required to establish payment disbursements to an underlying lienholder
 - Copy of most recent account statement/payment coupon from underlying lienholder for each lien being serviced
- Additional Parties Addendum (enclosed) – required for multiple Payees/Payors in addition to those listed on the Account Servicing Agreement
- Automatic Deposit Authorization (enclosed) – required to establish free automatic deposits to the Payee(s) designated bank account
- Automatic Withdrawal Authorization (enclosed) – required to establish free automatic payment debits from the Payor(s) designated bank account.

After completing the Account Servicing Agreement and applicable forms, please send all documents to Evergreen at:

Fax: (253) 445-3597

Email: NewAccounts@notecollection.com

Mail: Evergreen Note Servicing
615 E. Pioneer, Suite 111
Puyallup, WA 98372

Your account will be activated upon processing of all required documentation. Both parties will receive a confirmation Welcome Letter after setup. Please contact our Customer Service Department at (866) 358-6683 with any questions. We look forward to servicing your account!