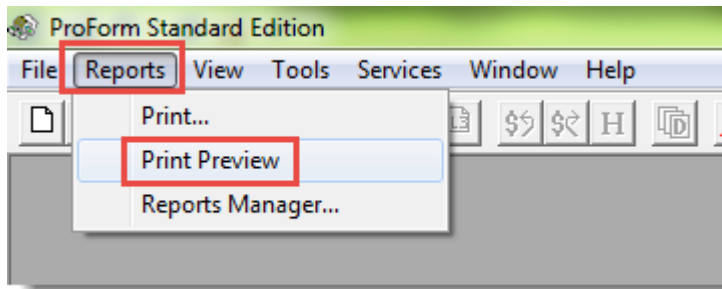


INVESTORS TITLE REMITTANCE REPORT

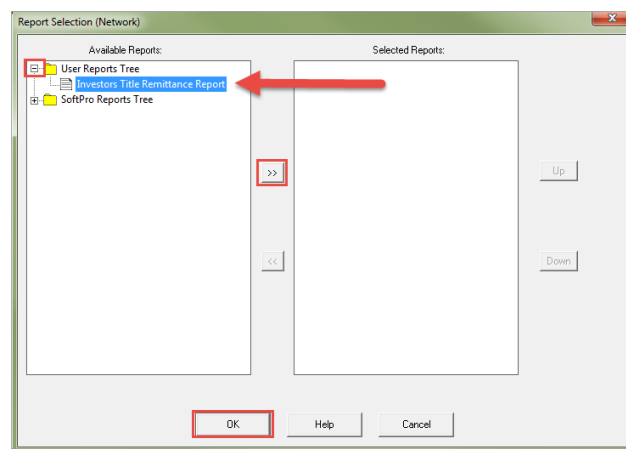
NOTE: The information populated into the fields is shown for example only.
Use the appropriate information for your state/underwriter/office.

The Investors Title Remittance Report can be accessed in the **ProForm** module by clicking **Reports / Print Preview**:

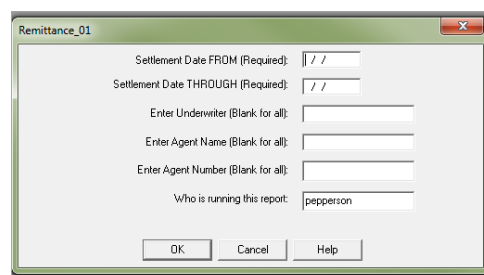


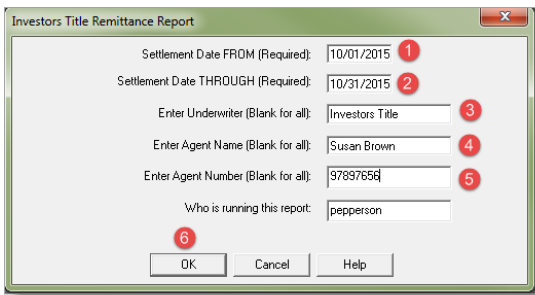
NOTE: Print may also be used to send directly to the printer without previewing.

Expand the **User Reports Tree**, select **Investors Title Remittance Report** (double-click to move to the **Selected Reports** panel or click the right arrows in the middle of the screen). Click **OK**



The report Filter Criteria box will appear. The only Required fields are **Settlement Date FROM** and **THROUGH**:





1 & 2 – Enter **Settlement Date** range to run report against

3 – Optional: Enter **Underwriter** name (note: Name must match exactly what is in the file). Leave blank to include all Underwriters.

4 – Optional: Enter the **Agent Name**. Leave blank to include all Agents.

5 – Optional: Enter the **Agent Number**. Leave blank to include all numbers.

6 – Click **OK**

FULLY COMPLETED COPY OF THE REPORT

Remittance											
Selection Criteria											
Settlement Date: 10/01/2015 through 10/31/2015											
Underwriter: Investors Title											
Agent Name: Susan Brown											
Agent Number: 97897656											
Policy Number(s)	Order Number	Rate Method	Buyer/Lender	Property Use	Property Address/County	Amount of Insurance	Settlement Date	Total Charges	Agent Portion	UW Portion	Prior Policy Information Number / Eff. Date / Covrg Comments
INVESTORS TITLE											
LP-0087656	2015100001	Sample Simultaneous Policy	Julie Martin and Laura Martin Jones / Hamilton Bank	Residential	1401 West Elm Drive Raleigh, NC 27609 - Wake County	\$90,000.00	10/28/15	\$180.00	\$144.00	\$36.00	LP 409987 1/1/2008 90,750.00
		CPL Fee						\$35.00	\$0.00	\$35.00	
		ALTA Endorsement Form 8.1 (Environmental Protection Lien)						\$25.00	\$20.00	\$5.00	
								Loan-Policy Total	\$240.00	\$164.00	\$76.00
OP-0182765		Sample Simultaneous Policy	Julie Martin and Laura Martin Jones / Hamilton Bank	Residential	1401 West Elm Drive Raleigh, NC 27609 - Wake County	\$100,000.00		\$127.00	\$101.60	\$25.40	LP 409987 1/1/2008 90,750.00
								Owners-Policy Total	\$127.00	\$101.60	\$25.40
								Order Total:	\$367.00	\$265.60	\$101.40
								Underwriter Total:	\$367.00	\$265.60	\$101.40

6030440001											
Page 1 of 1											
Date of Report: 10/28/15 Time of Report: 01:46:06PM Report by: pepperson											

Selection Criteria	Remittance
Settlement Date: 10/01/2015 through 10/31/2015 1	
Agent Name: Susan Brown 2	
Agent Number: 97897656 3	

1 – Effective date from and through as entered in the Filter Criteria box

2 – Name of the Agent as entered in the Filter Criteria box

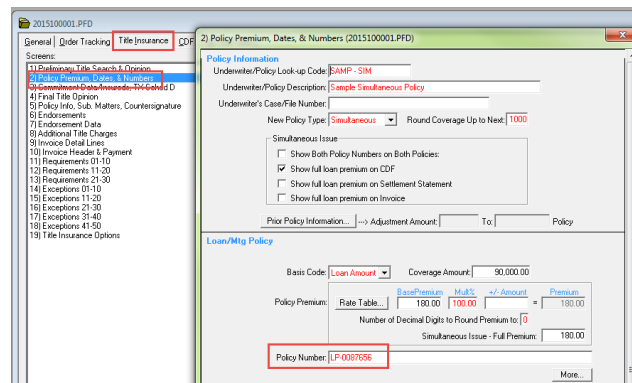
3 – Agent's number as entered in the Filter Criteria box

Policy Number(s)	Order Number	Rate Method	Buyer/Lender	Property Use	Property Address/County	Amount of Insurance	Settlement Date	Total Charges	Agent Portion	UW Portion	Prior Policy Information Number / Eff. Date / Covrg
INVESTORS TITLE											
LP-0087656	2015100001	Sample Simultaneous Policy	Jule Martin and Laura Martin Jones / Hamilton Bank	Residential	1401 West Elm Drive Raleigh, NC 27609 - Wake County	\$90,000.00	10/28/15	\$180.00	\$144.00	\$36.00	LP 409987 1/1/2008 90,750.00
		CPL Fee						\$35.00	\$0.00	\$35.00	
		ALTA Endorsement Form 8.1 (Environmental Protection Lien)						\$25.00	\$20.00	\$5.00	
								Loan-Policy Total	\$240.00	\$164.00	\$76.00
OP-0192765		Sample Simultaneous Policy	Jule Martin and Laura Martin Jones / Hamilton Bank	Residential	1401 West Elm Drive Raleigh, NC 27609 - Wake County	\$100,000.00		\$127.00	\$101.60	\$25.40	LP 409987 1/1/2008 90,750.00
								Owners-Policy Total	\$127.00	\$101.60	\$25.40
								Order Total:	\$367.00	\$265.60	\$101.40
								Underwriter Total:	\$367.00	\$265.60	\$101.40

The above screenshot displays an entry for one file. Following is a breakdown of the columns and the fields that populate the columns.

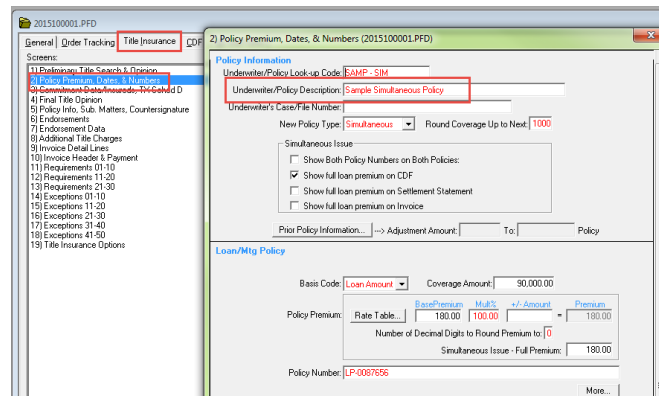
Policy Number(s)	Order Number	Rate Method	Buyer/Lender
INVESTORS TITLE	2		4
LP-0087656	2015100001	Sample Simultaneous Policy	Julie Martin / Hamilton Bank

1 – Policy Number(s): **Title Insurance** tab / screen 2 – **Policy Premium, Dates & Numbers** / **Policy Number**

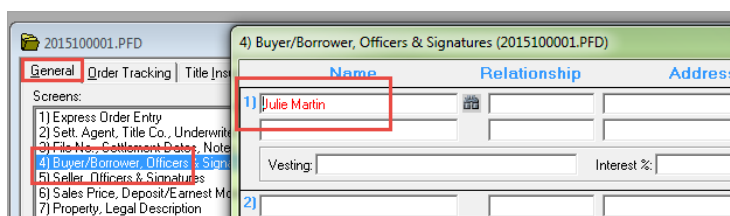


2 – **File Number**

3 – Rate Method: **Title Insurance** tab / screen 2 – **Policy Premium, Dates & Numbers** / **Underwriter/Policy Description**



4 – Buyer/Lender: **General** tab / screen 4 – **Buyer/Borrower Officers & Signatures** / **Name**



If multiple Buyers – all will be included

AND

General tab / screen 8 – Lender / Lender Name

2015100001.PFD

8) Lender (2015100001.PFD)

General | Order Tracking | Title Insurance

Screens:

- 1) Express Order Entry
- 2) Sett. Agent, Title Co., Underwriter, Officer & Signatures
- 3) File No., Settlement Dates, Notes
- 4) Buyer/Borrower, Officers & Signatures
- 5) Seller, Officers & Signatures
- 6) Sales Price, Deposit/Earnout Money
- 7) Property Legal Description
- 8) Lender
- 9) Mortgage Broker & Loan Servicer
- 10) Loan, Funding & ProTrust
- 11) Terms, Payment & ARM
- 12) Builder, Contract & Escrow for Completion
- 13) Real Estate Agents/Brokers
- 14) Buyer's & Seller's Attorneys
- 15) HOA/Mgmt. Company
- 16) Additional Contacts
- 17) Acknowledgment & Notary
- 18) Affidavit/Agreement Regarding Liens
- 19) Security Instruments, Trustee & Rider
- 20) Plats, Covenants & Conveyance
- 21) User Optional Fields: 1-25
- 22) User Optional Fields: 26-45
- 23) User Optional Fields: 46-65
- 24) General Options

Lender Information

Lender Look-up Code: [] Marketing Rep: []

Lender Name: **Hamilton Bank**

Lender Short/Payee Name: Hamilton Bank

Lender Full Legal Name: Hamilton Bank

Property Use	Property Address/County	Amount of Insurance	Settlement Date
Residential	1401 West Elm Drive Raleigh, NC 27609 - Wake County	\$90,000.00	10/28/15

5 – Property Use: General tab / screen 7 – Property Legal Description / The Land is Zoned as

2015100001.PFD

7) Property Legal Description (2015100001.PFD)

General | Order Tracking | Title Insurance

Screens:

- 1) Express Order Entry
- 2) Sett. Agent, Title Co., Underwriter, Officer & Signatures
- 3) File No., Settlement Dates, Notes
- 4) Buyer/Borrower, Officers & Signatures
- 5) Seller, Officers & Signatures
- 6) Sales Price, Deposit/Earnout Money
- 7) Property Legal Description
- 8) Lender
- 9) Mortgage Broker & Loan Servicer
- 10) Loan, Funding & ProTrust
- 11) Terms, Payment & ARM
- 12) Builder, Contract & Escrow for Completion
- 13) Real Estate Agents/Brokers
- 14) Buyer's & Seller's Attorneys
- 15) HOA/Mgmt. Company
- 16) Additional Contacts
- 17) Acknowledgment & Notary
- 18) Affidavit/Agreement Regarding Liens
- 19) Security Instruments, Trustee & Rider
- 20) Plats, Covenants & Conveyance
- 21) User Optional Fields: 1-25
- 22) User Optional Fields: 26-45
- 23) User Optional Fields: 46-65
- 24) General Options

Property Type: ☒ Single Family ☐ 1-4 Family ☐ PUD ☐ Condo ☐ Other []

Subdivision/Condo/PUD/Addition: []

Declaration: []

Co-op Owner's Organization Name: []

Ownership Interest: [] % Appraisal Information []

Section: [] Township: [] Range: []

Parcel NW: [] NE: [] SE: [] SW: []

Tax/Map ID: []

Parcel ID: []

Use of Property: ☒ Residential ☐ Commercial ☐ Unknown ☐ Other

Property Occupied by: ☒ Owner ☐ Tenant ☐ Unimproved ☐ Unknown

Primary/Principal Residence: ☒ Years Continuously Owned: []

The Land is Zoned as: **Residential**

6 – Property Address/County: General tab / screen 7 – Property Legal Description / Property Address, City, State, Zip Code and County Name

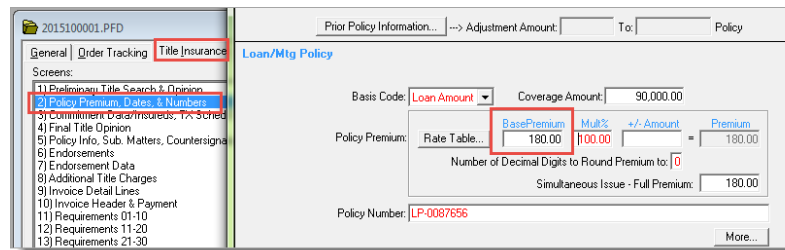
7 – Amount of Insurance: Title tab / screen 2 – Policy Premium, Dates & Numbers / Coverage Amount

NOTE: The Coverage Amount field will auto-populate from the Sales Price (for the Owner's Policy) and the Loan Amount (for the Loan Policy). Any changes should be made in the originating field.

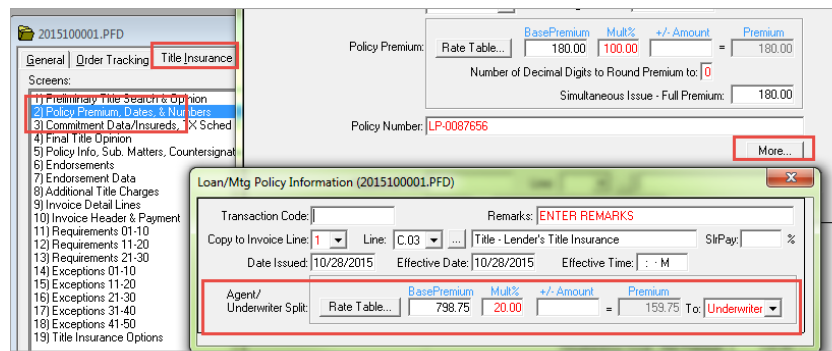
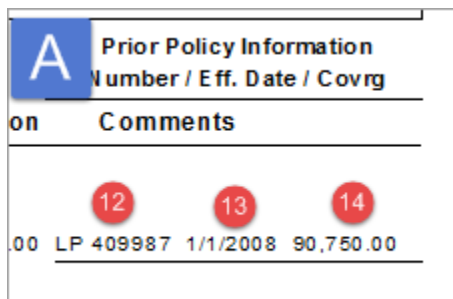
8 – Settlement Date: General tab / screen 3 – File No., Settlement Dates, Notes / Settlement Date

Total Charges	Agent Portion	UW Portion
9	10	11
\$180.00	\$144.00	\$36.00

9 – Total Charges: Title tab / screen 2 – Policy Premium, Dates & Numbers/ Base Premium

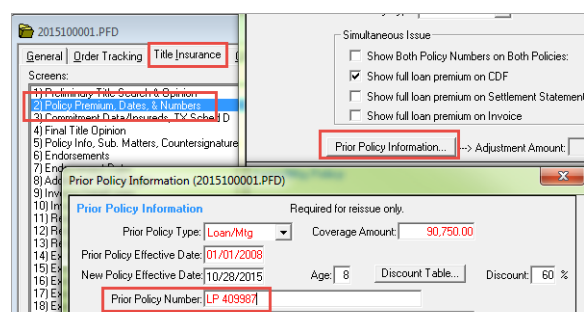


10 & 11 – Agent Portion and UW Portion: These amounts are calculated in the background based on the information found in **Title** tab / screen 2 – **Policy Premium, Dates & Numbers/ More** button / **Agent/Underwriter Split** section.

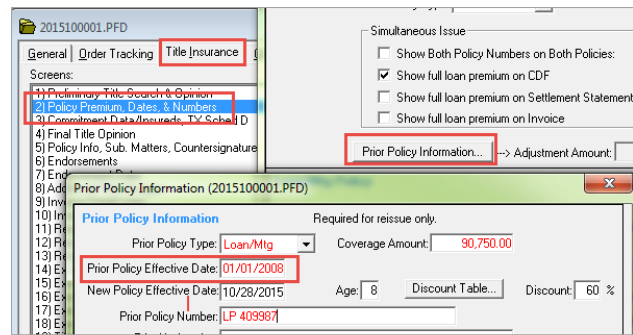



A – Prior Policy Information Number/Eff. Date/Covrg

12 – Prior Policy Number: **Title** tab / screen 2 – **Policy Premium, Dates & Numbers/ Prior Policy Information** button / **Prior Policy Number**

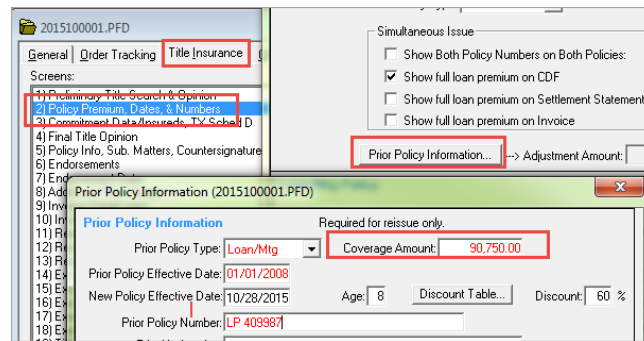


13 – Prior Policy Effective Date: **Title** tab / screen 2 – **Policy Premium, Dates & Numbers**/ **Prior Policy Information** button / **Prior Policy Effective Date**



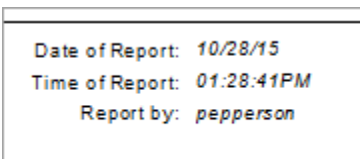
The screenshot shows the 'Prior Policy Information' dialog box for file 2015100001.PFD. The 'Title Insurance' tab is selected. In the 'Screens' list, '2) Policy Premium, Dates, & Numbers' is highlighted. The dialog box contains the following fields: 'Prior Policy Type' (Loan/Mtg), 'Coverage Amount' (90,750.00), 'Prior Policy Effective Date' (01/01/2008), 'New Policy Effective Date' (10/28/2015), 'Age' (8), 'Discount Table' (Discount Table...), and 'Discount' (60 %). The 'Prior Policy Number' is LP 409987. The 'Prior Policy Information...' button is also highlighted with a red box.

14 – Prior Policy Coverage Amount: **Title** tab / screen 2 – **Policy Premium, Dates & Numbers**/ **Prior Policy Information** button / **Coverage Amount**



This screenshot is identical to the one above, showing the 'Prior Policy Information' dialog box. The 'Coverage Amount' field is highlighted with a red box and contains the value '90,750.00'.

NOTE: "Comments" pertains to the prior coverage information.



The screenshot shows a box with the following text: 'Date of Report: 10/28/15', 'Time of Report: 01:28:41PM', and 'Report by: pepperson'.

By default, the **Date of Report** and **Time of Report** will auto-populate with the date and time the report is rendered. **Report by** will default to the username of the party rendering the report unless changed in the Filter Criteria box.