

CalHFA Loan Closing Checklist Instructions

To obtain your project specific Loan Closing Checklist, please email your Loan Administrator and they will send you a project specific Loan Closing Checklist electronically. Please do not fill out the sample online.

When you have 80% of the required due diligence, pursuant to the Loan Closing Checklist that pertains to your project, please provide to your [Loan Administrator](#), via CalHFA's Secure Send.

Please **DO NOT** save the checklist items in subfolders. Files should be named each checklist item number then description (*e.g. 2-Preliminary Title Report, etc.*)

Please check off the documents you are submitting, on the checklist if you have previously submitted a document please put "PS" (previously submitted), for documents that are pending please put "TBS" (to be submitted).

You will very likely have subsequent due diligence to provide after you submit your closing binder, please submit those items via email; or if any of the documents are over 9 MB (megabytes) please send them via CalHFA's Secure Send.

When emailing due diligence please put the name of the project and the document name in the subject line.

Should you have any questions regarding this process please contact your [Loan Administrator](#).