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# Form Information

## Installment Contract Collection Agreement

Must be submitted on all new account set up(s). This document provides the basic information of the contract such as amounts, dates, addresses, general information and distribution(s).

## Customer ID Form

Required on all new account set up(s). Each party to the account must complete this form and provide identity verifying information, which FMI uses for interest reporting.

## Addendum to Escrow Instructions

**Exhibit A**

Acts as an additional escrow instruction to identify additional provisions for interest, payments, balloon/irregular payments, due in full and multiple disbursements.

**Exhibit B**

Identifies the form of reserves, if any, to the account. Pass-thru reserves are set up for exact wrap loans, bills paid by secondary party, etc. Retained reserves will be held in a separate account in FMI's name to make payments for insurances, taxes, space rent, etc.*

**Exhibit C**

This form covers information about the underlying loan. (Extra fees may apply.)

## Direct Deposit/Withdrawal via ACH

All accounts have electronic funds transfer available to them. Please note all accounts under the ACH program are subject to the same guidelines as regular payments. If your selected date falls on a weekend, the transaction will be submitted the next business day.

## Modification

This document identifies changes to the contract after set up. The appropriate documents should be submitted with any Modification. All parties to the contract must accept and sign the Modification form. Contact FMI for the appropriate fee.

## Change of Payer

Must be submitted to identify a new payer to the contract. This document should be accompanied by the proper transfer paperwork (Quitclaim Deed, Assumption packet), payee approval and fee. The FMI Change of Payer form does not transfer interest in property.

## Transfer by Payee

Must be submitted to identify new payee(s) and distribution information. This document should be accompanied by the appropriate transfer paperwork (Assignment w/note endorsement, Partial Assignments, Reconveyance/Release) and fees. This form does not transfer interest; if the appropriate paperwork is not submitted, the contract will not be transferred for reporting purposes.

## Internet Access

Once you have established a password with FMI, you may view your account history online through our website. You may view and print the current and past year account history. Changes cannot be made through this site; please contact FMI.

* The FMI reserve account is a zero balance account.