



ZAIO Appraisal Services
Account Set-Up Form
FAX TO: 800-369-4559

Date: _____ Phone: 800.541.1004 ext. _____ Sales Agent: _____
 Team / Lead: _____
 New Account New Branch Account on Prepay Terms Update Address/Contact

CLIENT PROFILE

Company: _____ **800 Phone:** _____
Address: _____ **Main Phone:** _____
City/St/Zip: _____ **FAX:** _____
Dept: _____ **Email:** _____
Contact: _____ **Title:** _____

Business Type: Mortgage Broker Mortgage Banker Mtg Insurance Processing Service
 Bank/S&L Investor Reseller Other Business: _____

Lending Type: Fannie/Freddie Gov't / FHA Jumbo/Luxury Outsource Processing Service
 Non Conf / Alt-A Subprime; B/C Private Inv Other: _____

Departments: Retail (central) Wholesale Home Equity Internet/web originations
 Retail (branches) Correspondent QC Other: _____

Monthly Closings: _____ **Monthly Applications:** _____
Projected ZAIO orders per month: _____
Geographic distribution: National Regional **List top / regional states:** _____
Primary Markets Serviced (ex: First Mortgages, Home Equity, etc): _____

BILLING SPECIFICATIONS

Invoice delivery: Mail Hardcopy **OR** Spreadsheet by e-mail, to be sorted by: _____
Billing Type: Central Branch **RAMS Account #:** _____
Bill To: SAME ADDRESS AS ABOVE BILL TO ADDRESS IS CORP OFFICE BILL TO ADDRESS IS BRANCH

Billing Options:

Option 1: Invoice w/ each appraisal, pay individually Yes No
Option 2: Invoice w/ each appraisal and monthly summary Yes No
Option 3: Prepay w/ credit card: lender responsible for fee disputes Yes No **Requires Mgmt Approval**
Option 4: Monthly summary in Excel e-mailed to billing contact Yes No
Option 5: Monthly summary only mailed to branch Yes No

Billing address if different from above:
 Address: _____
 Address 2: _____
 City, ST Zip: _____

Billing Contact Name: _____ **Billing Contact Phone #:** _____ **Billing Contact e-mail address:** _____

For internal use only: Client ID: _____ User Name: _____
 Branch ID: _____ Password: _____



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ACCOUNT SPECIFICATIONS

Ordering Method: ZAIO Website Fax Form Custom Interface Bulk/Excel Email
 Other: _____

Delivery of Appraisals: To requestor ZAIO website To general mailbox address: _____

Would you like to receive the email status notifications? No Yes

PRODUCT SPECIFICATIONS Please check products you anticipate ordering.

<input type="checkbox"/> 1004 URAR/Single Family	<input type="checkbox"/> 2075 Property Inspection Report	<input type="checkbox"/> RSS Title/Settlement Services
<input type="checkbox"/> FHA Single Family	<input type="checkbox"/> 2070 Property Inspection Report	<input type="checkbox"/> Property/Ownership reports
<input type="checkbox"/> 1073 Condo/Townhouse	<input type="checkbox"/> 1007 Rent Schedule	<input type="checkbox"/> Title Insurance
<input type="checkbox"/> 1025 Multi-Family	<input type="checkbox"/> 216 Operating Income Statement	<input type="checkbox"/> Closing Services/HUD 1
<input type="checkbox"/> RealValue Desktop Appraisal	<input type="checkbox"/> Land Valuation	<input type="checkbox"/> Witness-only Closing Services
<input type="checkbox"/> 2055 Drive-By	<input type="checkbox"/> 2000 Field Review	<input type="checkbox"/> Other: _____
<input type="checkbox"/> 2055 (Exterior/Interior) - Old Form	<input type="checkbox"/> 2006 Desk Review	

POLICIES AND PROCEDURES

1. Special Requirements: ZAIO adheres to all guidelines established by USPAP, FNMA, FHLMC, Federal and state regulations.

Client Specifications: _____
 Please list all special guidelines, if applicable. **NOTE:** Special requirements may result in an increased fee.

2. Cancellation Policy: The following charges may be applied if an open order is cancelled.

Traditional Appraisal Products 1004, 1025, 1073, 2055, 2065, 2070, 2075, Field Review	
Product Status	Fee Assessed
Order Assigned	Up to \$50.00 Fee
Property Inspected	50-100% of Full Fee
Customer "no show" at appointment	\$75.00-\$150.00

Non-Traditional Appraisal Products Desk Review, RealValue DeskTop Appraisal	
Product Status	Fee Assessed
Order Assigned	Up to \$50.00 Fee
Property Inspected	50-100% of Full Fee
Customer "no show" at appointment	\$75.00-\$150.00

3. Appraiser Docs: As a component of our service, ZAIO assumes the responsibility of monitoring our appraisers license and resume -- therefore does not provide appraiser documents. Any requested appraiser documentation may require an additional charge.

CREDIT Information:

Federal/Tax ID#: _____ **Organization Type:** _____
D&B #: _____

CLIENT ACKNOWLEDGEMENT

Guidelines: I (we) certify that I (we) have reviewed and accepted the foregoing information on appraisal guidelines, cancellation policy, and appraiser documentation requests. I (we) agree that we are responsible for the total appraisal cost and all extraneous costs generated by special guidelines, order cancellations, and appraisal documentation in our name under our established account number.

Certification: I (we) certify that the foregoing information is true and accurate to the best of my (our) knowledge. I (we) agree to comply with the standard terms of sales that require payment on receipt of invoice within 30 days of receipt if an up-front payment method is not required. I (we) agree that we are responsible for all invoices generated in our name under our established account number. If I (we) fail to comply with the standard terms of sale, I (we) agree to pay all collection and litigation costs incurred by ZAIO to recover such payment.

Business Name _____ License # (Business, Broker) _____
 Print Name _____ Title _____
 Signature _____ Date _____

Internal Approval: _____	President	SVP Sales & Business Development
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