

Massachusetts Real Estate Law Document Library

AFFIDAVITS

Affidavit and Agreement - Fannie Mae Form 1099
Affidavit of Borrower re Bankruptcy
Affidavit of Borrower re Locus of Mortgaged Property
Affidavit of Borrower re Principal Residence (Refinance)
Affidavit of Borrower re Title Insurance (Refinance)
Affidavit of Purchaser re Bankruptcy

Affidavit of Purchaser re Locus of Mortgaged Property
Affidavit of Purchaser re Principal Residence (Sale)
Affidavit of Seller re No Outstanding Mortgage
Affidavit of Seller re Title Insurance (Sale)
Affidavit re Domestic Ownership (Non-Foreign)
Affidavit re Names and Aliases

AGREEMENTS

Agreement and Acknowledgment of Purchaser re Plot Plan
Agreement to Adjust Payment of Real Estate Taxes
Borrower's Agreement re Execution of Confirmatory Instruments
Escrow Agreement (Purchase)
Escrow Agreement (Refinance)
Lead Paint Indemnification Agreement
Purchase and Sale of Real Estate (Condominium)
Purchase and Sale of Real Estate (Land Only)

Purchase and Sale of Real Estate (With Septic System)
Purchase and Sale of Real Estate (Without Septic System)
Rescission Escrow Agreement
Seller's Agreement for Payment and Indemnification
Seller's Agreement re Execution of Confirmatory Instruments and Payment of Outstanding Mortgage Debt in Full
Smoke Detector Indemnification Agreement
Standard Addendum to Purchase and Sale Agreement

AUTHORIZATIONS AND CERTIFICATIONS

Attorney's Certificate of Title (Purchase)
Attorney's Certificate of Title (Refinance)
Authorization of Borrower to Disburse Mortgage Loan Proceeds (Purchase)
Authorization of Borrower to Disburse Mortgage Loan Proceeds (Refinance)
Authorization of Purchaser to Disburse Mortgage Loan Proceeds (Purchase)
Authorization of Purchaser to Disburse Mortgage Loan Proceeds (Refinance)
Borrower's Certification and Authorization to Release Information
Certification of Fire, Flood and Hazard Insurance
Certification of Seller for No Information Reporting on Sale or Exchange of Principal Residence
Certification of Transferor as to Non-Foreign Status (Corporation)

Certification of Transferor as to Non-Foreign Status (Individual)
I.R.C. Section 6045 Compliance Certification
Limited Power of Attorney for Representing Purchaser at Closing
Limited Power of Attorney for Representing Seller at Closing
Mortgage Pay-Off Request Authorization (Purchaser)
Mortgage Pay-Off Request Authorization (Seller)
Purchaser's Statement of Satisfaction and Understanding of Documents
Purchaser's Statement of Satisfaction and Understanding of Documents - Condominium
Purchaser's Statement of Willingness to Close and Hold Harmless
Seller's Statement of Disclosure of Current Mortgagees
Title V Certification and Indemnification
Urea Formaldehyde Foam Insulation (UFFI) Certificate

CORRESPONDENCE

Letter - General
Letter re Enclosure - Action
Letter re Enclosure - No Action
Letter to Borrower - General
Letter to Borrower re Enclosure - Action
Letter to Borrower re Enclosure - No Action
Letter to Borrower re First Mortgage Payment

Letter to Borrower re Instructions for Purchase or Refinancing
Letter to Borrower re Transfer of Mortgage Loan Service
Letter to Borrower's Attorney - General
Letter to Borrower's Attorney re Enclosure - Action
Letter to Borrower's Attorney re Enclosure - No Action
Letter to Borrower's Attorney re Instructions for Purchase or Refinancing

Letter to City-Town Clerk re Municipal Lien Certificate
 Letter to Client - General
 Letter to Client re Enclosure - Action
 Letter to Client re Enclosure - No Action
 Letter to Client re Prospective Representation by Firm
 (Borrower)
 Letter to Client re Prospective Representation by Firm
 (Purchaser)
 Letter to Current Mortgagee - General
 Letter to Current Mortgagee re Enclosure - Action
 Letter to Current Mortgagee re Enclosure - No Action
 Letter to Current Mortgagee's Attorney - General
 Letter to Current Mortgagee's Attorney re Enclosure - Action
 Letter to Current Mortgagee's Attorney re Enclosure - No
 Action
 Letter to Lender - General
 Letter to Lender re Enclosure - Action
 Letter to Lender re Enclosure - No Action
 Letter to Lender re Preference for Taking Title
 Letter to Lender's Attorney - General
 Letter to Lender's Attorney re Enclosure - Action

Letter to Lender's Attorney re Enclosure - No Action
 Letter to Lender's Attorney re Preference for Taking Title
 Letter to Purchaser - General
 Letter to Purchaser re Enclosure - Action
 Letter to Purchaser re Enclosure - No Action
 Letter to Purchaser re First Mortgage Payment
 Letter to Purchaser re Instructions for Purchase or Refinancing
 Letter to Purchaser re Transfer of Mortgage Loan Service
 Letter to Purchaser's Attorney - General
 Letter to Purchaser's Attorney re Enclosure - Action
 Letter to Purchaser's Attorney re Enclosure - No Action
 Letter to Purchaser's Attorney re Instructions for Purchase or
 Refinancing
 Letter to Seller - General
 Letter to Seller re Enclosure - Action
 Letter to Seller re Enclosure - No Action
 Letter to Seller re Obligations of Seller
 Letter to Seller's Attorney - General
 Letter to Seller's Attorney re Enclosure - Action
 Letter to Seller's Attorney re Enclosure - No Action
 Letter to Title Company re Title Examination

DEEDS AND DECLARATIONS

Declaration of Homestead - Homeowner
 Declaration of Homestead - Householder

Quitclaim Deed

FHA FORMS

Condominium Rider
 Mortgage
 Note (Adjustable Rate)

Note (Fixed Rate)
 Rider (Adjustable Rate)

FNMA FORMS, MULTIFAMILY - DEFEASANCE

Form 4078 - Original Defeasance Option
 Form 4078B - Alternative Defeasance Option
 Form 4178 - Note - Schedule A - Prepayment Premium –
 Original Defeasance Option
 Form 4178B - Note - Schedule A - Prepayment Premium -
 Alternative Defeasance Option
 Form 4184 - Note - Schedule B - Modifications to Note –
 Original Defeasance Option - 30360
 Form 4184B - Note - Schedule B - Modifications to Note -
 Alternative Defeasance Option - 30360

Form 4185 - Note - Schedule B - Modifications to Note – Original
 Defeasance Option - Actual360
 Form 4185B - Note - Schedule B - Modifications to Note -
 Alternative Defeasance Option - Actual360
 Form 4528 - Defeasance Assignment and Assumption Agreement
 Form 4529 - Defeasance Pledge Agreement
 Form 4550.DEF - Defeasance Opinion of Borrower's Counsel
 Form 4622 - Defeasance Notice
 Form 4630 - Defeasance Authorization for ACH Remittance
 Form 4631 - Defeasance Transmittal Form

FNMA FORMS, MULTIFAMILY - FORWARD COMMITMENT

Form 4158 - Delivery Assurance Note (Exhibit F)
 Form 4193 - Rate Lock Note (GICs)
 Form 4503 - Subordination Agreement - Affordable Housing
 Form 4517.FCAL - Table of Contents for Construction
 Advance Loan Delivery Package
 Form 4517.FPML - Table of Contents for Permanent
 Mortgage Loan Conversion Delivery Package

Form 4517.FRLL - Table of Contents for Rate Lock Loan
 Delivery Package - GICs
 Form 4518 - Certificate of Borrower
 Form 4527 - Assignment of Investment Agreement - GOCs
 Form 4540 - Subordinate Financing Certificate
 Form 4543 - Pre-Construction Monitoring Package
 Form 4547-A - Certificate of Loan Terms (Exhibit A)
 Form 4547-B - Escrow Agreement (Exhibit B)

Form 4547-C - Construction Letter of Credit (Exhibit C)
 Form 4547-D1 - Initial Bank Certificate (Exhibit D-1)
 Form 4547-D2 - Subsequent Bank Certificate (Exhibit D-2)
 Form 4547-E - Letter of Credit Rating Requirements (Exhibit E)
 Form 4547-Guaranty - Addendum to Master Forward
 Financing Guaranty Agreement (Guaranty)
 Form 4547-Recourse - Addendum to Master Forward
 Financing Guaranty Agreement (Recourse Obligation)
 Form 4548 - Forward Commitment with Rate Lock Loan and
 Security Agreement - GIC
 Form 4557 - Term and Information Sheet - GIC
 Form 4558 - Timeline and Checklist - GIC
 Form 4559 - Request for Binds on Investment Agreement
 (GIC)
 Form 4560 - Rate Lock Loan and Investment Agreement
 Information Sheet - GIC

Form 4561 - Corporate Resolution with Certification and
 Incumbency Certificate - Single Rate Lock Loan - GIC
 Form 4562 - Corporate Resolution with Certification and
 Incumbency Certificate - Global Rate Lock Loan
 Program - GIC
 Form 4563 - Form of Legal Opinion - GIC – Investment
 Agreement Provider is a Bank
 Form 4564 - Form of Legal Opinion - GIC – Investment
 Agreement Provider is Not a Bank
 Form 4600.FCAL - Instructions for Preparing the
 Construction Advance Loan Delivery Package
 Form 4600.FRLL
 Form 4616 - Notice of Conversion for Cash, MBS and Rate
 Lock Transactions
 Form 4617 - Notice of Conversion for Bond Credit
 Enhancement and MBS Transactions

FNMA FORMS, MULTIFAMILY - MANUFACTURED HOUSING

Form 4518-MHC - Certificate of Borrower
 Form 4550-MHC - Opinion of Borrower's Counsel (with
 Enforceability Opinion)

Form 4555 - UCC-1 Financing Statement - Schedule A
 Form 4556 - Seasonal Working Capital Reserve and Security
 Agreement

FNMA FORMS, MULTIFAMILY - MODERATE REHABILITATION

Form 4085 - Exhibit B, Modifications to Instrument
 Form 4280 - Rehabilitation Loan Risk Sharing Supplement to
 DUS Master Loss Sharing Agreement

Form 4281 - Exhibit A to Rehabilitation Loan Risk Sharing
 Supplement
 Form 4523 - Rehabilitation Reserve and Security Agreement
 Form 4569-ModRehab - Intercreditor Agreement

FNMA FORMS, MULTIFAMILY – MORTGAGES AND NOTES

Form 4100 - Fixed Rate Note (Non-Recourse)
 Form 4100-ARM.1L - 1-Month LIBOR ARM without
 Conversion
 Form 4100-ARM.1LC - 1-Month LIBOR ARM with
 Conversion
 Form 4100-ARM.3L - 3-Month LIBOR ARM without
 Conversion
 Form 4100-ARM.3LC - 3-Month LIBOR ARM with
 Conversion
 Form 4100-IO - Interest Only Note
 Form 4100-R - Fixed Rate Note (Recourse)

Form 4122 - Fixed Rate Note (Non-Recourse)
 Form 4122-ARM.1L - 1-Month LIBOR ARM without
 Conversion
 Form 4122-ARM.1LC - 1-Month LIBOR ARM with
 Conversion
 Form 4122-ARM.3L - 3-Month LIBOR ARM without
 Conversion
 Form 4122-ARM.3LC - 3-Month LIBOR ARM with
 Conversion
 Form 4122-IO - Interest Only Note
 Form 4122-R - Fixed Rate Note (Recourse)

FNMA FORMS, MULTIFAMILY – SECURITY INSTRUMENTS AND MODIFICATIONS

Form 4065 - Tax Credit Modification to Security Instrument

FNMA FORMS, MULTIFAMILY - SENIORS HOUSING

Form 4075 - Exhibit B - Modifications to Instrument
 Form 4079 - Assignment and Subordination of Operating
 Agreement
 Form 4186 - Schedule B - Modifications to Note

Form 4510-SH - Subordination, Non-Disturbance and
 Attornment Agreement
 Form 4524 - Assignment of Leases and Rents
 Form 4526 - Assignment of Contracts
 Form 4550-SH - Opinion of Borrower's Counsel

FNMA FORMS, SINGLE FAMILY - MORTGAGES AND NOTES

Form 3200 - Fixed Rate Note	Form 3519 - Convertible Adjustable Rate Note - Fannie Mae 6-Month LIBOR Index
Form 3255 - Growing Equity Note	Form 3520 - Adjustable Rate Note - WSJ 6-Month LIBOR Index
Form 3260 - Balloon Fixed Rate Note	Form 3521 - Convertible Adjustable Rate Note - WSJ 6-Month LIBOR Index
Form 3263 - Fixed-Adjustable Rate Note - 10-Year Treasury	Form 3522 - Fixed-Adjustable Rate Note - 1-Year Treasury Index
Form 3264 - Biweekly Fixed Rate Note (with Conversion Option)	Form 3523 - Fixed-Adjustable Rate Note - 1-Year Treasury Index - Convertible
Form 3265 - Biweekly Fixed Rate Note (without Conversion Option)	Form 3524 - Adjustable Rate Note - WSJ 1-Month LIBOR Index
Form 3267 - Convertible Fixed-Adjustable Rate Note - 10-Year Treasury	Form 3525 - Fixed-Adjustable Rate Note - WSJ 1-Year LIBOR Index
Form 3271 - InterestFirst Fixed Rate Note	Form 3526 - Adjustable Rate Note - WSJ 1-Year LIBOR Index
Form 3501 - Adjustable Rate Note - ARM 5-1	Form 3527 - Adjustable Rate Note - WSJ 1-Year LIBOR Index
Form 3502 - Adjustable Rate Note - ARM 5-2	Form 3528 - Fixed-Adjustable Rate Note - WSJ 1-Year LIBOR Index
Form 3503 - Adjustable Rate Note - ARM Plans 721-521 & 652-791	Form 3529 - Adjustable Rate Note - WSJ 1-Year LIBOR Index - Convertible
Form 3504 - Adjustable Rate Note - 3-Year ARM	Form 3530 - InterestFirst Adjustable Rate Note - 1-Year LIBOR Index
Form 3505 - Adjustable Rate Note - ARM Plan 650	Form 3531 - InterestFirst Adjustable Rate Note - 1-Year Treasury Index
Form 3508 - Convertible Adjustable Rate Note - Single Family - 1-Year Treasury Index	Form 3532 - InterestFirst Adjustable Rate Note - 1-Year LIBOR Index
Form 3510 - Adjustable Rate Note - COF Index	Form 3533 - InterestFirst Adjustable Rate Note - 1-Year Treasury Index
Form 3511 - Convertible Adjustable Rate Note	
Form 3512 - Adjustable Rate Note - ARM Plans 711-511	
Form 3514 - Adjustable Rate Note - 5-Year ARM	
Form 3515 - Convertible Adjustable Rate Note - CD Index	
Form 3516 - Adjustable Rate Note - CD Index	
Form 3517 - Adjustable Rate Note - Fractional 1-Year Treasury Index	
Form 3518 - Adjustable Rate Note - Fannie Mae 6-Month LIBOR Index	

FNMA FORMS, SINGLE FAMILY - RIDERS AND ADDENDA

Form 1410 - Timely Payment Rewards Addendum to Note	Form 3137 - Convertible Adjustable Rate Rider - 6-Month LIBOR Index
Form 1412 - Timely Payment Rewards Rider	Form 3138 - Adjustable Rate Rider - WSJ 6-Month LIBOR Index
Form 3108 - Adjustable Rate Rider - ARM 5-1	Form 3139 - Convertible Adjustable Rate Rider - WSJ 6-Month LIBOR Index
Form 3109 - Fixed Rate Option Addendum (Security Instrument)	Form 3140 - Condominium Rider
Form 3111 - Adjustable Rate Rider - ARM 5-2	Form 3150 - PUD Rider
Form 3113 - Adjustable Rate Rider - ARM Plans 721-521 & 652-791	Form 3170 - 1-4 Family Rider
Form 3114 - Adjustable Rate Rider - 3-Year ARM	Form 3176 - Fixed-Adjustable Rate Rider - 10-Year Treasury Index - First Lien
Form 3115 - Adjustable Rate Rider - ARM Plan 650	Form 3177 - Bi-weekly Payment Rider (Fixed Rate)
Form 3118 - Convertible Adjustable Rate Rider	Form 3178 - Bi-weekly Payment Rider (Fixed Rate)
Form 3120 - Adjustable Rate Rider - COF Index	Form 3180 - Balloon Rider
Form 3122 - Adjustable Rate Rider - WSJ 1-Year LIBOR Index	Form 3181 - Convertible Fixed-Adjustable Rate Rider - 10-Year Treasury Index
Form 3124 - Convertible Adjustable Rate Rider - COF Index	Form 3182 - Fixed-Adjustable Rate Rider - 1-Year Treasury Index
Form 3129 - Adjustable Rate Rider - ARM Plan 711-511	Form 3183 - Convertible Fixed-Adjustable Rate Rider - 1-Year Treasury Index
Form 3131 - Adjustable Rate Rider - 5-Year ARM	Form 3184 - Adjustable Rate Rider - WSJ 1-Month LIBOR Index
Form 3133 - Convertible Adjustable Rate Rider - CD Index	
Form 3134 - Adjustable Rate Rider - CD Index	
Form 3135 - Adjustable Rate Rider - Fractional 1-Year Treasury Index	
Form 3136 - Adjustable Rate Rider - 6-Month LIBOR Index	

Form 3186 - Adjustable Rate Rider - WSJ 1-Year LIBOR Index
Form 3187 - Fixed-Adjustable Rate Rider - WSJ 1-Year LIBOR Index
Form 3188 - Fixed-Adjustable Rate Rider - WSJ 1-Year LIBOR Index
Form 3189 - Adjustable Rate Rider - WSJ 1-Year LIBOR Index

Form 3256 - Fixed Rate Option Addendum
Form 3266 - Balloon Note Addendum
Form 3736 - Construction Loan Addendum to Note
Form 3738 - Investor Rider to Security Instrument
Form 3890 - Second Home Rider

FNMA FORMS, SINGLE FAMILY - SECURITY INSTRUMENTS AND MODIFICATIONS

Form 3022 - Security Instrument

Form 4065 - Tax Credit Modification to Security Instrument

GENERAL

Attendees at Closing
Benefits of Owner's Title Insurance
Case Intake Sheet
Closing Documents Checklist
General Characteristics of Title to Real Estate
General Instructions to Purchaser from Lender's Attorney

General Instructions to Seller from Lender's Attorney
HUD-1 Instructions
M.G.L. c. 148, §26E (Smoke Detectors)
Revolving Credit Mortgage
Statement Pursuant to M.G.L. c. 93, §70 (Responsibilities and Certifications)

LAND COURT

Checklist for Voluntary Withdrawal of Land from Registration System
Complaint for Voluntary Withdrawal of Land from Registration System
LCA-2 - Assignment of Mortgage
LCC-3 - Certificate of Opinion
LCD-3 - Tax Deed

LCD-4 – General
LCD-5 - Deed Grantor
LCM-2 - Probate Memoranda
LCM-6 - Memoranda
Notice of Voluntary Withdrawal of Land from Registration System
Petition for New Certificate after Death
Petition for Partition

LANDLORD – TENANT

Commercial Lease
Commercial Lease (Self-Extending)
Commercial Lease (Self-Extending - with Tax Escalator)
Commercial Lease (with Tax Escalator)
Notice of Trespass
Notice to Quit – General
Notice to Quit for Non-Payment of Rent
Notice to Quit for Non-Payment of Rent (with FDCP Act Consumer Debtor Notice of Rights)
Landlord - Tenant (Continued)
Residential Lease – Apartment

Residential Lease - Apartment (Self-Extending)
Residential Lease - Apartment (Self-Extending - with Tax Escalator)
Residential Lease - Apartment (with Tax Escalator)
Residential Lease - Single Family Dwelling
Residential Lease - Single Family Dwelling (Self-Extending)
Residential Lease - Single Family Dwelling (Self-Extending - with Tax Escalator)
Residential Lease - Single Family Dwelling (with Tax Escalator)

NOTARY

Notary Jurat - Affidavit or Other Sworn or Affirmed Declaration
Notary Jurat - Attorney-Principal
Notary Jurat - Certified Copy

Notary Jurat - Individual with Oath or Affirmation
Notary Jurat - Individual without Oath or Affirmation
Notary Jurat - Representative of Business Entity

NOTICES AND REQUESTS

Initial Escrow Account Disclosure Statement
Notice and Statement of Real Estate Tax Escrow Account
Notice of Right of Rescission
Notice to Purchaser of Availability of Owner's Title Insurance

Notice to Quit – General
Notice to Quit for Non-Payment of Rent
Request for Surveying Services

OFFICIAL FORMS

HUD Form HUD-1 - Settlement Statement
HUD Form HUD-1A - Settlement Statement (Optional Form
for Transactions without Sellers)

Truth-In-Lending Disclosure for Real Estate Mortgage Loans

RELEASES, DISCHARGES AND ASSIGNMENTS

Assignment of Mortgage of Real Estate (Corporation)
Assignment of Mortgage of Real Estate (Individual)
Discharge of Mortgage of Real Estate (Corporation) -
Purchaser as Dischargee
Discharge of Mortgage of Real Estate (Corporation) - Seller as
Dischargee

Discharge of Mortgage of Real Estate (Individual) - Purchaser
as Dischargee
Discharge of Mortgage of Real Estate (Individual) - Seller as
Dischargee

TAX DOCUMENTS

Information for Form 1099-S Real Estate Report Filing

VA FORMS

Assumption Policy Rider
Fixed Rate Note (Single Family)

Form 26-6319a - Mortgage Note
Mortgage (Single Family)