

New York & New Jersey Co-op Intake Form



For New York and New Jersey Co-ops only, complete the information below.

1. Borrower Name: _____
Co-Borrower Name: _____
2. Property Address: _____

3. Loan Amount: _____
4. Purchase Refinance
5. Co-op Corporation Name: _____
6. Co-op Management Company Contact Information:
Management Company Name: _____

Address: _____

Phone Number: _____
Contact Name: _____

Along with the completion of this form provide the following documents:

1. 1003 Loan Application
2. Contract of sale if purchase
3. Copy of Stock Certificate if refinancing
4. Current Mortgage statement if refinancing
5. Copy of current lease with co-op

Email this form along with the documents listed above to one of the law firms listed below:

- 1) Corey Gindi at the law firm of Abrams, Garfinkel, Margolis, Bergson, LLP (AGMB) **(NY & NJ)**
Email: cgindi@agmbllaw.com
Phone: (646) 473-7585
- 2) Kevin Schmitt at the law firm of Kevin Schmitt & Associates, PC **(NY Only)**
Email: Kschmitt@ksapc.net
Phone: (516) 794-0774
- 3) Voula Viglis at the law firm of Voula Viglis **(NY Only)**
Email: Voulaviglis@gmail.com
Phone: (212) 918-4668

***WesLend will be using the law firms above to initiate the co-op process and as the settlement agent for New York. The AGMB law firm will be the ONLY firm used for the New Jersey co-op process and as the settlement agent. The law firm selected will send a Welcome Package to the borrowers which includes a check request, Authorization to File UCC-1, Lien Search Order Form and Aztech Recognition Agreements.**

****Be sure and inform the borrowers that they should contact their co-op management board to determine if approval is required for their refinance, and if so, the borrower must initiate the process with the co-op management board. Additional fees may be charged to the borrower by the co-op management board for review and approval.**