

Date: [Current Date]

To: [Current Mortgage Servicer Name]

Address: [Current Mortgage Servicer Address]

City, State, Zip: [City, State, Zip]

Subject: Authorization to Transfer Escrow Surplus

Loan Number: [Current Loan Number]

Property Address: [Property Address, City, State, Zip]

To Whom It May Concern,

I am writing to formally authorize the transfer of any surplus funds remaining in my escrow account following the payoff of my current mortgage loan due to a refinance.

Please apply the full balance of any escrow overage, including property tax and insurance reserves, directly to the principal balance of my new loan with the following institution:

New Lender Name: [New Lender Name]

New Loan Number: [New Loan Number (if available)]

Payee Name: [New Lender or Closing Agent Name]

If a direct transfer is not possible, please issue a check for the surplus amount payable to me and mail it to the following address within 30 days of the loan payoff:

Mailing Address: [Your Forwarding/Current Address]

City, State, Zip: [City, State, Zip]

Should you have any questions regarding this request, please contact me at [Your Phone Number] or [Your Email Address].

Thank you for your prompt attention to this matter.

Sincerely,

[Borrower Signature]

[Co-Borrower Signature (if applicable)]

[Borrower Printed Name]

[Co-Borrower Printed Name]