



Sample Letter Requesting Mortgage Release Insurance Proceeds

NOTE: This letter is a sample that must be customized to fit the facts of your individual situation and claim. All bracketed and underlined portions must be completed or revised before sending. Use this letter to request your mortgage company release insurance proceeds.

(Date)

(Name Supervisor)

(Name of Mortgage Co.)

(Address)

Re: Claim Number _____

Loan Number _____

Date of Loss: _____

Name of Insured: _____

Address of Insured Property: _____

Dear [Mortgage Company],

Please send me copies of all claim-related documents. For purposes of this request, “claim-related documents” means all documents that relate to the evaluation of damages, including, but not limited to, repair and replacement estimates and bids, appraisals, scopes of loss, drawings, plans, reports, third-party findings on the amount of loss, covered damages, and cost of repairs, and all other valuation, measurement, and loss adjustment calculations of the amount of loss, covered damage, and cost of repairs. [NOTE: if you live in California, this language comes directly from Cal. Ins. Code 2071 – Requirements in Case Loss Occurs. Feel free to include a citation]

Please send it to the mailing address listed below within fifteen (15) calendar days of the date of this letter. Thank you in advance for your prompt handling of my request. I look forward to receiving the above-requested documents and working with [INSURANCE COMPANY] to complete the claim process.

Sincerely,

YOUR NAME MAILING ADDRESS

The information presented in this publication is for general informational purposes, and is not a substitute for legal advice. If you have a specific legal issue or problem, United Policyholders recommends that you consult with an attorney. Guidance on hiring professional help can be found in the “Find Help” section of www.uphelp.org. United Policyholders does not sell insurance or certify, endorse or warrant any of the insurance products, vendors or professionals identified at our website.