



25531 Commercentre #250 Lake Forest, CA 92630  
(833) 381-8733 | www.theLender.com

# BUSINESS PURPOSE DOC REQUEST

Account Executive: \_\_\_\_\_ Account Manager: \_\_\_\_\_

Subject Property Address: \_\_\_\_\_ Loan Number: \_\_\_\_\_

Borrower Name: \_\_\_\_\_ Co Borrower Name: \_\_\_\_\_

Title Co.: \_\_\_\_\_ Phone #: \_\_\_\_\_ Contact: \_\_\_\_\_

Escrow Co.: \_\_\_\_\_ Phone #: \_\_\_\_\_ Contact: \_\_\_\_\_

Escrow Email: \_\_\_\_\_ Broker Owned Escrow (Needs prior lender approval)  Yes  No

Is a POA for Borrower being used?  Yes  No POA Name: \_\_\_\_\_  
(Needs prior lender approval)

Is title being held in an LLC?  Yes  No  
(Needs prior lender approval)

Email DOCS to (Must be to Escrow or Title Co.): \_\_\_\_\_

Name /Entity Vesting to read as Follows (Must be accurate): \_\_\_\_\_

Vesting as: \_\_\_\_\_

Estimated closing date: \_\_\_\_\_ First payment date: \_\_\_\_\_

### LOAN PROGRAM

7/6 Arm  10/6 Arm  30 Yr Fixed  40 Yr Fixed  30 Yr Fixed I/O (10yr I/O period)  40 Yr Fixed I/O (10yr I/O period)  Interest Only (10yr I/O period)

### PREPAYS & ACH

5 yr  4 yr  3 yr  2 yr  1 yr  0 Prepay Penalty (\*RI, MI and OH Only)

**ACH**  Yes  No **\*0.125% LLRA hit if waived**

### TRANSACTION TYPE

Purchase  Refi Cash-Out  Rate / Term  Impounds  Yes  No

### RATE AND FEES

Purchase Price: \_\_\_\_\_ Loan Amount: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

	Broker/Lender Fee	Special Notes
Lender Discount Fee	%	
Broker Origination Fee	%	
Processing Fee	\$	If 3rd party, provide invoice
Appraisal Fee	\$	
theLender U/W Fee	\$1995	
Credit Report	\$	
Yield Spread Credit	\$	Paid to: <input type="checkbox"/> Borrower
Yield Spread Premium	\$	Paid to: <input type="checkbox"/> Broker
theLender DocPrep Fee	\$ 599.00	

Appraisal Fee - POC  Yes  No (Must have invoice)

Broker wants to be reimbursed for appraisal fee  Yes  No Amount: \_\_\_\_\_

\*\* WET CLOSING \*\* - Scheduled Closing Date: \_\_\_\_\_

Other Fee: \_\_\_\_\_

### BROKER INFORMATION

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

