

AE Name: \_\_\_\_\_ Account Manager: \_\_\_\_\_

Estimated Closing Date: \_\_\_\_\_

Broker Disclosed       Lender Disclosed:  Use Fee sheet supplied with submission     Use Estimated fee through "Smart Fees"

Broker/Contact Information			
Broker Name		Broker NMLS	
Processor Name		Loan Officer Name	
Processor Phone		Loan Officer Phone	
Processor Email		Loan Officer Email	
Contract Processor NMLS		Loan Officer NMLS	
3rd Party Processing Fee \$		Broker Credit Report Fee	
Affiliates	<input type="checkbox"/> Yes *Must Disclose on LE <input type="checkbox"/> No	Broker Compensation	<input type="checkbox"/> Borrower Paid
BPC Amount			

Borrower Information				
Borrower Name		FICO		Borrower Email
Co-Borrower Name		FICO		Co-Borrower Email
Co-Borrower Name		FICO		Co-Borrower Email

Property Information				
Property Address				
City		State		Zip Code
Value/Purchase Price		Property Type		AMC

Loan Information							
1st Loan Amount		2nd Loan Amount		Interest Rate		LTV	
Interest Rate				<input type="checkbox"/> Discount for Rate Chosen			
Loan Purpose	<input type="checkbox"/> Cash Out		Occupancy:	<input type="checkbox"/> Primary <input type="checkbox"/> Investment <input type="checkbox"/> Secondary			

Product	
Second Product Type	<input type="checkbox"/> 10 yr fixed <input type="checkbox"/> 15 yr fixed <input type="checkbox"/> 20 yr fixed <input type="checkbox"/> 30 yr fixed
Loan Program	<input type="checkbox"/> Stand Alone 2nd

Credit Report
<input type="checkbox"/> Reissue Credit through TPO portal <input type="checkbox"/> Lender to pull new credit

Minimum Submission Requirements	
<input type="checkbox"/> Signed initial 1003 <input type="checkbox"/> 1008 <input type="checkbox"/> Mortgage Statement/Note of the Senior Lien reflecting the loan terms	<input type="checkbox"/> Credit Authorization <input type="checkbox"/> Income docs - <input type="checkbox"/> Full doc - 2 Years - Standard Fannie Mae Documentation <input type="checkbox"/> Full doc - 1 Year - 1 yr W-2 <input type="checkbox"/> Full doc - 1 Year - 1 yr tax returns <input type="checkbox"/> Bank Statements - 12 or 24 month options available <input type="checkbox"/> Prior Appraisal (if available)

Notes and Other Comments

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

Loan Number: \_\_\_\_\_

Program Name: \_\_\_\_\_

Hello UW,

**INCOME:**

Full Doc     WVOE     Banks Statement: 12 or 24 Months     1099

Rental Cash Flow     Asset Qualifier     P&L

**CREDIT:**

**EXCEPTION:**

**Additional Comments:**

