

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	
In-house Processing Fee \$			
Affiliates	<input type="checkbox"/> Yes *Must Disclose on LE <input type="checkbox"/> No	Broker Compensation	<input type="checkbox"/> Borrower Paid
BPC Amount OR Percentage (PLEASE NOTE: 1.5% max broker comp on theSecond or theSECOND) -			

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		LTV		CLTV
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
Stand Alone 2nd Program	<input type="checkbox"/> theSECOND <input type="checkbox"/> theSECOND+ <input type="checkbox"/> theLine (HELOC): ↳ <input type="checkbox"/> 2-year draw <input type="checkbox"/> 3-year draw <input type="checkbox"/> 5-year draw

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

Minimum Submission Requirements	
<input type="checkbox"/> Initial 1003 signed by LO <input type="checkbox"/> 1008 <input type="checkbox"/> Mortgage Statement/Note of the Senior Lien reflecting the loan terms <input type="checkbox"/> Driver's License or Photo ID to the submission requirements section <input type="checkbox"/> Prior Appraisal (if available) <input type="checkbox"/> UW Cover Sheet <input type="checkbox"/> Credit report dated w/in 60 days or credit authorization	<input type="checkbox"/> Income docs (theSECOND and theSECOND+) <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 months <input type="checkbox"/> Bank Statements - 24 months <input type="checkbox"/> 1099 <input type="checkbox"/> Income docs (theSECOND only) <input type="checkbox"/> WVOE <input type="checkbox"/> P&L Only

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:

