



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

40yr Term 30yr Fixed 7/6 Arm 10/6 Arm I/O

PREPAYS & ACH

Prepay Term: 5 yr 4 yr 3 yr 2 yr 1 yr 0 Prepay Penalty *Please see matrix for state restrictions

Prepay Option: 6 months of interest Declining 3% Fixed 5% Fixed

ACH Yes No *.250 LLPA 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	\$ _____ or _____ %	
Broker Origination Fee	\$ _____ or _____ %	
Processing Fee	\$ _____	If 3rd party, provide invoice
Appraisal Fee	\$ _____	
theLender U/W Fee	\$2095	
Credit Report	\$ _____	
Yield Spread Credit	\$ _____ or _____ %	Paid to: <input type="checkbox"/> Borrower
Yield Spread Premium	\$ _____ or _____ %	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: _____

