



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: ☐ Declining ☐ 3% Fixed ☐ 5% Fixed ☐ 6 mo. interest on prepay >20% of original balance in any 12 mo. period

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: ☐ Borrower
Yield Spread Premium	\$	or %	Paid to: ☐ 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: _____



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