



ACCOUNT EXECUTIVE: _____

Broker:	LO Name:
Broker Contact:	Broker Contact Phone:
Broker Contact Email:	
Contract Processing? Y <input type="checkbox"/> or N <input type="checkbox"/> IF Yes NMLS#:	Fee: Must provide invoice
Call Before Pulling New Credit/AUS? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Compensation: Lender Paid <input type="checkbox"/> or Borrower Paid <input type="checkbox"/>	
Underwriting Fee in the Rate? Y <input type="checkbox"/> or N <input type="checkbox"/>	Owner Occ Non Owner Occ 2nd Home
VA- Veteran Exempt? Y <input type="checkbox"/> or N <input type="checkbox"/>	
Borrower Name:	SSN:
Co-Borrower Name:	SSN:
Borrower Email:	
Co-Borrower Email:	
Notes for File:	
PROGRAM:	TERM: FIX/ARM:
PURPOSE:	PROPERTY TYPE:
MID CREDIT SCORE:	ESCROWS: Y <input type="checkbox"/> N <input type="checkbox"/> W2 Transcript Only : Y <input type="checkbox"/> N <input type="checkbox"/>
PROPERTY ADDRESS:	
SALES PRICE:	PROPERTY VALUE:
LOAN AMOUNT:	LTV: CLTV:
Mortgage Insurance Type:	NOTE RATE:

<p>Minimum Submission Requirements:</p> <ul style="list-style-type: none"> ➤ 1003/1008 ➤ Broker Credit Report & LS Borrower Auth ➤ Income Documentation (dated w/in 60 days) <ul style="list-style-type: none"> Current Paystubs (30 days of coverage) SSI or Pension Award Letters 2 Years W2's and/or Tax Returns ➤ Asset Documentation (dated w/in 60 days) <ul style="list-style-type: none"> Most Recent 2 Month's Statements Gift Documentation (if Applicable) ➤ Preliminary Title Report ➤ Purchase contract (if Applicable) ➤ Mortgage Note/Payment Coupon (Refi Only) ➤ Proof of Insurance <p>FHA:</p> <ul style="list-style-type: none"> ➤ Case Request Form ➤ 92900A (1003 Addendum) ➤ Streamline - Mortgage Only Credit w/ 3 Scores <p>VA:</p> <ul style="list-style-type: none"> ➤ Case Request form/VA Appraisal Order ➤ VA 26-1880 or Certificate of Eligibility ➤ Military ID Cards ➤ Nearest Living Relative and Child Care Stmnts. 	<p>Minimum Disclosure Requirements:</p> <p>We Disclose</p> <ul style="list-style-type: none"> ➤ 1003/92900A <u>Dated Within 24 Hours</u> ➤ LS Borrower Auth & Broker Credit Report ➤ Service Provider List ➤ Estimated Closing Statement from Title/Escrow ➤ NO other disclosures may be submitted <p>Broker Disclose</p> <ul style="list-style-type: none"> ➤ Broker Full Set of State Specific Disclosures ➤ Accurate LE ➤ Estimated Closing Statement from Title/Escrow ➤ Intent to Proceed ➤ Service Provider List ➤ Anti Steering Form ➤ Form 4506T *Do NOT provide on ALT DOC <i>First page of tax returns for all borrowers is highly recommended</i> ➤ Homeownership Counseling Disclosure <p>FHA ID: 20996-0000-1 VA ID: 169917-00-00</p> <p>Mortgagee Clause: OCMBC, Inc. ISAOA 19000 MacArthur Blvd., Suite 200 Irvine, CA 92612</p>
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