

Please fulfill minimum submission requirements to expedite review and approval.

Thank you for your loan submission. Please complete this form in its entirety and include all required documents, as listed below, with your submission. Only complete submissions will progress to Underwriting.

CONTACT INFORMATION	
Broker: _____	Acct Executive: _____
Main Contact, for decisions/questions below:	
Contact: _____	Phone: _____
Title: _____	Email: _____

REQUESTED LOAN TERMS	
Submission Type: <input type="checkbox"/> Full Submission <input type="checkbox"/> Disclosures Only	Disclosures By: <input type="checkbox"/> Broker <input type="checkbox"/> Lender
Loan Application Date: _____	Estimated Closing Date: _____
Borrower: _____	Co-borrower: _____
Borr. Email: _____	Cobo. Email: _____
Subject Property: _____	
1st Loan Amount: _____	1st Loan LTV: _____
2nd Loan Amount: _____	2nd Loan LTV: _____
Appraised (Est) Value: _____	Loan Purpose: _____ <input type="checkbox"/> Concurrent Second
Interest Rate: _____	Program: _____
Term: _____	Purch Price: _____
Loan Type: _____	If CalHFA: Temporary Buydown? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, Term: _____
Occupancy: _____	Property Type: _____
Mtg. Insurance: _____	Lender Fee Buyout? <input type="checkbox"/> UW Fee <input type="checkbox"/> Doc Fee Impounds? <input type="checkbox"/> Yes <input type="checkbox"/> No
How should LoanStream handle Borrower Credit Report?* <input type="checkbox"/> Pull new credit <input type="checkbox"/> Use attached Broker credit	
Approved Credit Vendors: _____	FHA Condo Spot Approval Request? <input type="checkbox"/> Yes <input type="checkbox"/> No

\* If credit option not selected, LoanStream will pull new credit


BROKER COMPENSATION	
Comp. Type: <input type="checkbox"/> Borrower Paid <input type="checkbox"/> Lender Paid	If Borrower Paid, Amount: _____
Loan Processing done in-house (not 3rd-party)? <input type="checkbox"/> Yes <input type="checkbox"/> No	MLO & RE Agent (Buyer or Seller) the same? <input type="checkbox"/> Yes <input type="checkbox"/> No
If No, 3rd-Party Invoice with NMLS ID is Required. If Yes, provide Dual Role Disclosure; not allowed for FHA/USDA	

REQUIRED DOCUMENTATION CHECKLIST	
<input type="checkbox"/>	Completed Wholesale Submission Form
<input type="checkbox"/>	Completed 1008 (if applicable)
<input type="checkbox"/>	Completed 1003, signed/dated by Borrower(s) and Loan Officer (if applicable, REO section must be thoroughly completed)
<input type="checkbox"/>	Credit Report for All Borrowers and Non-borrowing Spouse (if applicable) if using Broker credit reports
<input type="checkbox"/>	Borrower's Certification and Authorization (aka Broker Disclosures)
<input type="checkbox"/>	Escrow/Closing 3 <sup>rd</sup> Party Fee Sheet
<input type="checkbox"/>	Broker Fee Sheet** with Supporting Invoices (including, if applicable, third-party processing invoice with NMLS ID)
<input type="checkbox"/>	eConsent from Borrower(s) if any documents are eSigned
<input type="checkbox"/>	All Broker-specific disclosures required per state regulations and transaction type, if applicable, Dual Role Disclosure
<input type="checkbox"/>	Broker's completed/signed Anti-Steering Disclosure and Affiliated Business Arrangement (ABA) Disclosure, if applicable
<input type="checkbox"/>	Supporting mortgage statement/tax/insurance information for all REO listed on 1003
<input type="checkbox"/>	If Purchase: Purchase Agreement with all Addendums
<input type="checkbox"/>	If FHA: FHA 92900A, pages 1 & 2, fully executed
<input type="checkbox"/>	If FHA: FHA Case Request Form
<input type="checkbox"/>	If FHA/VA: Streamline Mortgage Only Credit Report
<input type="checkbox"/>	If VA: VA Form 26-1802A fully executed by Borrower(s) and Loan Originator
<input type="checkbox"/>	If VA: VA Certificate of Eligibility
<input type="checkbox"/>	If VA Refinance: VA Refinance Loan Comparison Disclosure (see Forms on LoanStream TPO Portal) and Mortgage Note
<input type="checkbox"/>	If VA IRRRL: VA 26-8923 Interest Rate Reduction Loan Worksheet and VA IRRRL Loan Comparison
<input type="checkbox"/>	If USDA: Request for Single Family Housing Loan Guarantee (Form RD 3555-21)

\*\* Only permissible fees per federal, state, and local law are allowed.

Income Documentation Requirements	
<input type="checkbox"/>	If Wage Earner: Most recent 30 days paystubs, all borrowers (or as required per AUS) OR last 2 years W2s, all borrowers
<input type="checkbox"/>	If Self-employed: 2 Years 1099s (as applicable), All K1s (as applicable), Tax returns (1 or 2 Years, based on program)
<input type="checkbox"/>	If Retired: Award Letter, Retirement Statement, 1099s, or recent bank statement supporting retirement income

If Broker Disclosed, Additional Documentation Requirements	
<input type="checkbox"/>	Initial Loan Estimate (LE) with SSPL, all subsequent LEs with Change of Circumstance (COC) and supporting documentation
<input type="checkbox"/>	All federal, state, and local initial disclosures per transaction type
<input type="checkbox"/>	All broker-specific disclosures per state regulations and transaction type
<input type="checkbox"/>	If FHA: All FHA required disclosures per transaction type
<input type="checkbox"/>	If VA: All VA required disclosures per transaction type
<input type="checkbox"/>	If USDA-RHS: All USDA required disclosures per transaction type
<input type="checkbox"/>	If ARM: All ARM required disclosures

Mortgagee Clause: OCMBC, Inc. ISAOA 19000 MacArthur Blvd., Suite 200 Irvine, CA 92612  Lender IDs: FHA: 20996-0000-1 VA: 169917-00-00	LoanStream Contacts: for General Inquiries Corporate Office Phone: (800) 760-1833 Lock Desk Email: lockdesk@lsmortgage.com UW Scenario Desk: scenarios@lsmortgage.com	 Corporate Office: 19000 MacArthur Blvd., Suite 200 Irvine, CA 92612 NMLS ID #2125 www.LoanStreamWholesale.com
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