



Loan Number _____ Doc Request Date _____ Anticipated Sign Date _____
 Lock Expiration _____ First Payment Date _____
 Account Executive _____ Account Manager _____

BROKER INFORMATION

Broker _____ Contact _____
 Email _____ Phone _____

ESCROW/CLOSING AGENT

Company Name _____ Officer/Agent _____
 Email/Doc Email _____ Phone _____

BORROWER INFORMATION (as it is to appear on the loan documents)

Borrower Name _____ Co-Borrower Name _____
 Non-Borrowing Spouse (if applicable) _____ Co-Borrower on Title Only Yes No
 Vesting _____
 Title Only Borrower (if applicable) _____ Vesting in an Entity (LLC/Inc) Yes No
 POA (approval required PTD) Yes No (If yes, attach copy of POA; allow 24 hours for review.)

LOAN INFORMATION

Product _____ Program _____ Note Rate _____
 Term _____ ARM _____ Jumbo _____
 Purchase Price _____ Appraised Value _____ Occupancy _____
 Base Loan Amt _____ Total Loan Amt _____
 LTV _____ CLTV _____ MI is: BPMI LPMI UFMIP Paid in Cash Yes No
 Impounds Yes No (Impounds are required on all Government and Non-QM loans.)
 Comp Plan _____ Borrower Paid Lender Paid

Fees must match the GFE/LE. Please obtain updated Title and Escrow Fees.

ORIGINATION FEES

BROKER/LENDER FEE	FEE PERCENT	FEE AMOUNT
Broker Compensation Fee		
Broker Credit Report Fee POC <input type="checkbox"/> Yes <input type="checkbox"/> No Reimburse Broker <input type="checkbox"/> Yes <input type="checkbox"/> No		
Broker Processing Fee (Must be 3 rd party with invoice or must be borrower-paid transaction with total charges less than selected max lender comp and/or QM max fees.)		
Broker Misc. Fee _____		
LSM Wholesale Underwriting Fee (If fee bought out, enter zero -0-.)		
Discount Points		
Credit to Borrower YSP Paid to Broker (DSCR Only) <input type="checkbox"/> Yes <input type="checkbox"/> No		
Appraisal Fee POC <input type="checkbox"/> Yes <input type="checkbox"/> No Reimburse Broker <input type="checkbox"/> Yes <input type="checkbox"/> No (Appraisal Invoice must show Broker Paid.)		

INFORMATION/NOTES