



CLICK TO CLEAR FORM FIELDS

Loan Number _____ Doc Request Date _____ Confirmed 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 ☐ Yes ☐ No

Vesting _____

Title Only Individual (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

Program _____ Note Rate _____ Term _____

Occupancy _____ Purchase Price _____ LTV _____

ARM _____ Appraised Value _____ CLTV _____

I/O _____ PPP _____ Base Loan Amt _____ Total Loan Amt _____

MI is: ☐ BPMI ☐ LPMI UFMIP Paid in Cash ☐ Yes ☐ No

Impounds ☐ Yes ☐ No Restrictions may apply to waiving impound (escrow) accounts.

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 ☐ Yes ☐ No Reimburse Broker ☐ Yes ☐ 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		
YSP (Non-TRID Business Purpose Only) Credited to Borrower ☐ Yes ☐ No		
Appraisal Fee POC ☐ Yes ☐ No Reimburse Broker ☐ Yes ☐ No (Appraisal Invoice must show Broker Paid when requesting reimbursement.)		

HYBRID eCLOSE

Broker to Utilize Hybrid eClose ☐ Yes ☐ No

Hybrid eClose is ineligible on:

1. CalHFA

2. Closing with POA

3. Non-TRID Business Purpose

4. Trust Vesting

5. TX Properties

If utilizing Hybrid eClose, provide an email address and cell phone number for each borrower and any Title Only

NAME	CELL PHONE #	EMAIL ADDRESS

INFORMATION/NOTES