

Requested Date:		Loan Number:	
Lock Expiration Date:		Anticipated Signing Date:	
<input type="checkbox"/> Request CD Prior to CTC			
<b>Borrower Information (as they should appear on the docs)</b>			
Borrower Name:		Borrower 2 Name:	
Non-Borrowing Spouse/Other Name:			
Non-Borrowing Phone:		Non-Borrowing Email:	
<input type="checkbox"/> Trust	Trust Name:		
<input type="checkbox"/> Is Borrower a Business Entity?	Business Entity Name:		
<input type="checkbox"/> Personal Guarantor	PG Name:		
Vesting:			
<input type="checkbox"/> POA (approval Required prior to Docs) - Attach copy of POA			
<b>Property Information</b>		<b>Loan Information</b>	
Street Address:		Term:	Loan Program:
City:		Appraised Value:	Loan Amount \$:
State:		Sales Price \$:	Interest Rate%:
Zip:		First Payment:	Lien Position:
		PUD/Condo Name:	
		Impounds/Escrows:	<input type="checkbox"/> No Escrows <input type="checkbox"/> Taxes & Insurance <input type="checkbox"/> Taxes Only <input type="checkbox"/> Insurance Only <input type="checkbox"/> Flood Insurance Only
<b>Property Type</b>			
Property Type:		Units:	
Loan Purpose:			
<b>Compensation Plan</b> <i>*If Broker Comp is disclosed as a flat fee (\$) vs. a percentage (%), fee cannot be changed once it is disclosed.</i>			
<input type="checkbox"/> Lender Paid	Comp Plan %:		
<input type="checkbox"/> Borrower Paid	Broker Comp \$: *	Broker Comp %:	
Fees: Must match most recent disclosed LE and within APR Tolerance. Please obtain updated title and escrow fees.			
<b>Broker Fees</b>		<b>Broker Contact Information</b>	
<b>1. Origination Charges</b>	<b>Amount</b>	Company Name:	
Underwriting Fees	\$	Loan Officer Name:	
1 <sup>st</sup> Lien	\$	Loan Officer Email:	
2nd Lien	\$	Loan Officer Phone #:	
3 <sup>rd</sup> Party Processing Fee	\$	Processor Name:	
UW Fee Buyout	\$	Processor Phone Number:	
<b>2. Lender Credits, Discount Fees or Broker Credits</b>		<b>Escrow Company Information</b>	
Lender Credit to Borrower	\$	Company Name:	
Bonafide Discount Fee	\$	License #:	
<b>3. Required Services</b>		Escrow Officer:	
Appraisal Fee (Invoice Required)	\$	License #:	
Select one: <input type="checkbox"/> POC <input type="checkbox"/> PAC		Phone #:	
Select Paid by: <input type="checkbox"/> Broker <input type="checkbox"/> Borrower		Email for Docs:	
If applicable: <input type="checkbox"/> Broker Reimbursed		Address:	
Credit Report Fee (Invoice Required)	\$	City:	
Select one: <input type="checkbox"/> POC <input type="checkbox"/> PAC		State:	
Select Paid by: <input type="checkbox"/> Broker <input type="checkbox"/> Borrower		Zip:	
If applicable: <input type="checkbox"/> Broker Reimbursed		<b>Title Company Information</b>	
<b>Business Purpose Dual Comp (YSP)</b>		Company Name:	
\$ Paid to Broker	\$	Title Officer:	
% Paid to Broker	%	Phone #:	
<b>Notes:</b>			
	Email:		
	Address:		
	City:		
	State:		
	Zip:		
<b>Brokers Advantage Only</b>			
Account Executive:			
Account Manager:			
Notes:			
<b>Other Contact Information- Purchase Transaction Only</b>			
<b>A. Property Seller Realtor Information</b>			
Realtor Company Name:		License #:	
Agent Name:		Email:	
Agent Phone:		License #	
Address:			
<b>B. Buyer/Borrower Realtor Information</b>			
Realtor Company Name:		License #:	
Agent Name:		Email:	
Agent Phone:		License #:	
Address:			
<b>C. Property Seller Information</b>			
Property Seller Name:			
Address:			
Loan Officer Signature Line:			