

Loan Number: _____

Borrower Name: _____ Broker Name: _____

(Must exactly match Credit Report, FHAC & Vesting)

Account Manager: _____

Title Co.: _____ Phone #: _____ Contact: _____

Escrow Co.: _____ Phone #: _____ Contact: _____

Escrow Email: _____

Is there a Non-Purchasing Owner ☐ Yes ☐ No Name of Non-Purchasing Owner: _____

Is the loan closing in a Trust? ☐ Yes ☐ No

Is a POA for Borrower being used? ☐ Yes ☐ No

***NOTE: For Trust and/or POA, please provide additional supporting documents.

Closing in LLC ☐ Yes ☐ No Name of LLC: _____

Vesting to read as Follows (Must be accurate): _____

Estimated closing Date: _____ First Payment Date: _____

Loan Information

Mortgage Type _____ Loan Program Description: _____

Loan Purpose: _____ Amortization Type: _____

Interest Only: _____ Impounds: _____

Rates and Fees

Interest Rate: _____ Total Loan Amount: _____

Term in Months: _____

Lender Paid Comp _____ Borrower Paid Comp _____

Business Purpose (Premium Split) Total \$ _____ (or) _____ % Paid to Broker \$ _____ (or) _____ % Paid to Borrower \$ _____ (or) _____ %

Contract Processor Fee: _____ Contract Processor Name: _____

BROKER FEES (Borrower Paid Compensation Only):

Origination Fee: _____ Broker Other Loan Fee: _____ \$ _____

TOTAL BROKER FEES: _____

Appraisal Fee – POC ☐ Yes ☐ No (must have invoice / fee sheet) Appraised VALUE: _____

Broker wants to be reimbursed* for appraisal fee ☐ Yes ☐ No Amount _____

Credit Report Fee ☐ Yes ☐ No **If Yes, MUST HAVE INVOICE and fee sheet** Amount _____

Other Fee: _____

Broker Information

Name: _____ Email: _____

Phone: _____

Signature: _____ Date: _____