

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 \_\_\_\_\_ Coborrower Name \_\_\_\_\_  
 Non-Borrowing Spouse (if applicable) \_\_\_\_\_ Co-Borrower on Title Only  Yes  No  
 Vesting \_\_\_\_\_  
 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  
 Impounds  Yes  No (Impounds are required on all Government and NanQ 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		
Broker Processing Fee (Must be 3 <sup>rd</sup> 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 _____		
Underwriting Fee (If fee bought out, enter zero -0-.)		
Discount Points		
Credit to Borrower		
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.)*