



25531 Commercentre #250 Lake Forest, CA 92630  
 (833) 381-8733 | www.theLender.com

## BUSINESS PURPOSE DOC REQUEST

Account Executive: \_\_\_\_\_

Account Manager: \_\_\_\_\_

Borrower Name: \_\_\_\_\_ Co Borrower Name: \_\_\_\_\_

Title Co.: \_\_\_\_\_ Phone #: \_\_\_\_\_ Contact: \_\_\_\_\_

Escrow Co.: \_\_\_\_\_ Phone #: \_\_\_\_\_ Contact: \_\_\_\_\_

Escrow Email: \_\_\_\_\_ Broker Owned Escrow (Needs prior lender approval)  Yes  No

Is a POA for Borrower being used?  Yes  No POA Name: \_\_\_\_\_  
(Needs prior lender approval)

Is title being held in an LLC?  Yes  No  
(Needs prior lender approval)

Email DOCS to (Must be to Escrow or Title Co.): \_\_\_\_\_

Name /Entity Vesting to read as Follows (Must be accurate): \_\_\_\_\_

Vesting as: \_\_\_\_\_

Estimated closing date: \_\_\_\_\_ First payment date: \_\_\_\_\_

### LOAN PROGRAM

10 yr  7 yr  Interest Only  30yr Fixed  3 yr Prepay Penalty  1yr hard/2yr soft Prepay Penalty  0 Prepay Penalty

### TRANSACTION TYPE

Purchase  Refi Cash-Out  Rate / Term  Impounds  Yes  No

### RATE AND FEES

Purchase Price: \_\_\_\_\_ Loan Amount: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Broker/Lender Fee		Special Notes
Lender Discount Fee	%	
Broker Origination Fee	%	
Processing Fee	\$	If 3rd party, provide invoice
Appraisal Fee	\$	
theLender U/W Fee	\$1995	
Credit Report	\$	
Yield Spread Credit	\$	Paid to: <input type="checkbox"/> Borrower <input type="checkbox"/> Broker

Appraisal Fee - POC  Yes  No (Must have invoice)

Broker wants to be reimbursed for appraisal fee  Yes  No Amount: \_\_\_\_\_

\*\* WET CLOSING \*\* - Scheduled Closing Date: \_\_\_\_\_

Other Fee: \_\_\_\_\_

### BROKER INFORMATION

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

