

AE Name: \_\_\_\_\_ Account Manager: \_\_\_\_\_

Disclosures Only    
  Full Submission    
  Lender Disclosed    
  Broker Disclosed

Broker/Contact Information			
Broker Name		Broker NMLS	
Processor Name		Loan Officer Name	
Processor Phone		Loan Officer Phone	
Processor Email		Loan Officer Email	
Contract Processor NMLS		Loan Officer NMLS	
Lender Fee Buy Out	<input type="checkbox"/> Yes <input type="checkbox"/> No	Broker Compensation	<input type="checkbox"/> Lender Paid <input type="checkbox"/> Borrower Paid
Affiliates	<input type="checkbox"/> Yes (Must Disclose on LE) <input type="checkbox"/> No	BPC Amount	

Loan Identification Information			
Borrower Name		FICO	
Borrower Email			
Co-Borrower Name		FICO	
Co-Borrower Email			
Co-Borrower Name		FICO	
Co-Borrower Email			

Property Information				
Property Address				
City		State		Zip Code
Property Value		Property Type		AMC

Loan Information						
Loan Amount		Interest Rate		LTV		CLTV
Loan Purpose	<input type="checkbox"/> Purchase <input type="checkbox"/> R/T Refinance <input type="checkbox"/> Cash Out		Occupancy	<input type="checkbox"/> Primary <input type="checkbox"/> Investment <input type="checkbox"/> Secondary		

Loan Terms	
Non-QM Programs	Broker Disclosed Loans
<p><b>LOAN TERMS</b></p> <p> <input type="checkbox"/> 30 Fixed    <input type="checkbox"/> ARM    <input type="checkbox"/> 7/6    <input type="checkbox"/> 10/6  <input type="checkbox"/> Interest Only (10yr I/O period)  <input type="checkbox"/> 30YR    <input type="checkbox"/> 40YR                 </p> <p><b>PREPAYMENT OPTIONS</b> (allowed on Investment properties only)</p> <p> <input type="checkbox"/> None    <input type="checkbox"/> 1 year    <input type="checkbox"/> 2 year    <input type="checkbox"/> 3 year                 </p> <p><b>INCOME DOC TYPE:</b> (Select one)</p> <p> <input type="checkbox"/> Full Doc    <input type="checkbox"/> theGig (1099 Only)    <input type="checkbox"/> Asset Qualifier                 </p> <p><b>Personal Bank Statement</b>                      <b>Business Bank Statement</b></p> <p> <input type="checkbox"/> 12 months personal bank statements    <input type="checkbox"/> 12 months business bank statements  <input type="checkbox"/> 24 months personal bank statements    <input type="checkbox"/> 24 months business bank statements                 </p>	<p> <input type="checkbox"/> Signed initial Loan Application by borrower(s) and LO  <input type="checkbox"/> Fee Sheet  <input type="checkbox"/> Consent Form (Proof of LE delivery)  <input type="checkbox"/> Settlement Service Provider List (SSPL)  <input type="checkbox"/> Intent to Proceed  <input type="checkbox"/> Safe Harbor   Anti Steering (LPC only)  <input type="checkbox"/> Tool Kit  <input type="checkbox"/> Home Counseling Form  <input type="checkbox"/> Broker Disclosures and state specific Disclosures  <input type="checkbox"/> Credit Report(s)  <input type="checkbox"/> Credit Authorization  <input type="checkbox"/> Mortgage Broker Fee Agreement  <input type="checkbox"/> MLDS - CA Brokers Only                 </p>

Lender Disclosed Loans:	
Items below MUST be dated within 3 days of loan registered in TPO Connect	
<input type="checkbox"/> Signed Initial Loan Application by Borrower(s) and LO <input type="checkbox"/> Credit Authorization	<input type="checkbox"/> Fee Sheet <input type="checkbox"/> Settlement Service Provider List (SSPL)
<input type="checkbox"/> Mortgage Broker Fee Agreement <input type="checkbox"/> MLDS (CA Brokers Only)	
<p><b>Mortgagee Clause:</b>                      Hometown Equity Mortgage, LLC dba theLender                      ISAOA                      25531 Commercentre Dr #250 Lake Forest, CA 92630</p>	<p><b>Underwriting Fees:</b>                      Underwriting fee: \$1995.00</p>

