

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
<input type="checkbox"/> theExpanded <input type="checkbox"/> theNear-Prime <input type="checkbox"/> theNon-Prime	<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>LOAN TERMS</p> <input type="checkbox"/> 30 Fixed <input type="checkbox"/> ARM <input type="checkbox"/> 3/1 <input type="checkbox"/> 5/1 <input type="checkbox"/> 7/1 <input type="checkbox"/> Interest Only (10yr I/O period) <input type="checkbox"/> 30YR <input type="checkbox"/> 40YR Loan Term	
<p>PREPAYMENT OPTIONS (allowed on Investment properties only)</p> <input type="checkbox"/> None <input type="checkbox"/> 1 year <input type="checkbox"/> 2 year <input type="checkbox"/> 3 year	
<p>INCOME DOC TYPE: (Select one)</p> <input type="checkbox"/> Full Doc <input type="checkbox"/> Alt Doc 1 yr w-2 or 1 yr 1040	

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"/> Fee Sheet	<input type="checkbox"/> Mortgage Broker Fee Agreement
<input type="checkbox"/> Credit Authorization	<input type="checkbox"/> Settlement Service Provider List (SSPL)	<input type="checkbox"/> MLDS (CA Brokers Only)