

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	<input type="checkbox"/> POPSPlus	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			

* Loan Amount/LTV/CLTV should reflect expanded POPSPlus figures

Loan Terms

Non-QM Programs	Broker Disclosed Loans
<input type="checkbox"/> POPS®	<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"/> 7/1 ARM <input type="checkbox"/> 7/1 I/O 40Yr <input type="checkbox"/> 30Yr Fxd <input type="checkbox"/> 30Yr Fxd I/O <p>INCOME DOC TYPE: (Select one) <input type="checkbox"/> Bank statements - <input type="checkbox"/> Personal <input type="checkbox"/> Business <input type="checkbox"/> 24 months <input type="checkbox"/> 12 months</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"/> 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)