

Contacts

Company: _____
Loan Officer: _____ Phone: _____ Email: _____
LO Assistant: _____ Phone: _____ Email: _____
Processor: _____ Phone: _____ Email: _____
Account Executive: _____ Submission Date: _____

Borrower

First Name: _____ Credit Score: _____ Phone: _____
Last Name: _____ Email: _____

Co - Borrower

First Name: _____ Credit Score: _____ Phone: _____
Last Name: _____ Email: _____

Property Information

Street Address: _____
City: _____ State: _____ ZIP: _____
County: _____ Unit: _____ Property Type: _____

Loan Information

Interest Rate: _____ Program: _____ Term: _____
Loan Amount: _____ Appraised Value: _____ Purchase Price: _____
Purpose: _____ LTV: _____ CLTV: _____ Impound: _____
Prepayment Penalty: _____ Buydown: _____ Occupancy: _____ Interest Only: _____ FHTB: _____

Lender-Paid

Compensation Plan: _____ %
Discount Fee: \$ _____ %
Third Party Processing Fee: \$ _____
Other Fee: \$ _____
Fee Amount: \$ _____

Borrower-Paid

Origination Fee: \$ _____ %
Discount Fee: \$ _____ %
Processing Fee: \$ _____
Third Party Processing Fee: \$ _____
Other Fee: \$ _____
Fee Amount: \$ _____

Required Documents Checklist:

- | | | |
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| 1. Credit Report
Reissue from broker-pulled credit report OR
WMB pull new credit | 2. Est. Settlement Statements
Purchase: Buyer and Seller combined
Refinance: All broker fees | 3. Purchase Contract |
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