

Borrower Last Name: _____

Closing Date: _____ Time: _____

Funding Date: _____

Circle all that are applicable below:

Conventional	FHA	VA	Purchase
Refinance	Owner	Investment	PUD
2 nd Home	Fixed Rate	Adjustable	PMI Required
Condo	2 nd Mortgage	Balloon	

Broker Name: _____ Investor Name: _____

Contact: _____ Investor Loan #: _____

Phone #: _____ Investor Login: _____

Fax #: _____ Investor Password: _____

Email Docs To: _____ Email Address: _____

Email Allonge & Assignment To: _____ Email Address: _____

Title Company: _____

Address: _____

Closer Name: _____ Phone #: _____ Fax #: _____

LOAN TERMS

Base Loan Amount: _____ Total Amount: _____

Purchase Price: _____ Term: _____

Appraised Value: _____ Investor Program Number: _____

Interest Credit: ☐ Yes ☐ No First Payment Date: _____

FHA MIP/VAFF/PMI Financed at _____ % Interest Rate: _____

Adjustable Rate Terms: Index: _____ Margin: _____

First Payment Changes After: _____ months Convertible? _____

Caps: First Payment: _____ % Annual: _____ % Lifetime: _____ %

ESCROW INFORMATION

Escrow: ☐ Yes ☐ No Transfer: _____

PMI: Payable to: _____

Monthly Only? _____ Zero Up Front? _____

WE MUST HAVE MI CERT TO PREPARE DOCS!!!

Homeowner's Insurance: Payable to: _____

Premium: _____ Renewal Date: _____

Flood Insurance: Payable to: _____

Premium: _____ Renewal Date: _____

Property Taxes: Annually: _____ Due: _____

Schedule Number: _____

FEES AND CLOSING COSTS

Mortgage Broker Fee (YSP): _____ % Paid by Investor to Broker

	Borrower Paid:	Seller Paid:	Broker Paid:	POC:	Pay To Vendor:
Origination Fee:	_____	_____	_____	_____	<input type="checkbox"/>
Discount Charged:	_____	_____	_____	_____	<input type="checkbox"/>
Appraisal Fee to:					
_____	_____	_____	_____	_____	<input type="checkbox"/>
Credit Report to:					
_____	_____	_____	_____	_____	<input type="checkbox"/>
Final Inspection Fee:	_____	_____	_____	_____	<input type="checkbox"/>
Commitment Fee:	_____	_____	_____	_____	<input type="checkbox"/>
Processing Fee to:					
_____	_____	_____	_____	_____	<input type="checkbox"/>
Investor Fees:					
Underwriting:	_____	_____	_____	_____	<input type="checkbox"/>
Funding:	_____	_____	_____	_____	<input type="checkbox"/>
Flood/Wire:	_____	_____	_____	_____	<input type="checkbox"/>
Other:	_____	_____	_____	_____	<input type="checkbox"/>
Tax Service:	_____	_____	_____	_____	<input type="checkbox"/>
Other:					
Application Fee	_____	_____	_____	_____	<input type="checkbox"/>
Shipping Fee	_____	_____	_____	_____	<input type="checkbox"/>
Micellaneous Payoffs:					
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>
Survey to:					
_____	_____	_____	_____	_____	<input type="checkbox"/>

Please Fax All The Items Applicable With This Form

- ☐ Page 1 of Typed 1003

☐ PMI Certificate

☐ Schedule A of Title Work

☐ Power of Attorney

☐ VA Next of Kin Information

☐ Hazard Insurance Certificate

☐ Lock-in Confirmation
- ☐ Loan Approval

☐ FHA/MIP Refund Worksheet

☐ Flood Cert.

☐ Page 1 of Appraisal

☐ Title Co. Wire Instructions

☐ Tax Cert.

Miscellaneous Instructions: