



**LOAN INITIAL SUBMISSION FORM**

**Section I: Borrower and Property Information**

Borrower Name : \_\_\_\_\_ Co-Borrower Name : \_\_\_\_\_

Borrower Email : \_\_\_\_\_ Co-Borrower Email : \_\_\_\_\_

Phone # : \_\_\_\_\_ Borrower Mid Fico Score : \_\_\_\_\_ Phone # : \_\_\_\_\_ Co-Borrower Mid Fico Score : \_\_\_\_\_

Subject Property Address : \_\_\_\_\_

Mailing Address : \_\_\_\_\_

Insurance Company/Agent Name : \_\_\_\_\_ Company/Agent Phone # : \_\_\_\_\_

Insurance Policy Type : \_\_\_\_\_ Tenant W/ 30 Days : \_\_\_\_\_

Current Lenders Name : \_\_\_\_\_ Contact Phone # : \_\_\_\_\_ Est Pay Off : \$ \_\_\_\_\_

**Section II: Loan Program Information**

Purchase Price : \_\_\_\_\_ Est Property Value : \_\_\_\_\_ Property Type : \_\_\_\_\_

Doctype : \_\_\_\_\_ Occupancy Type : \_\_\_\_\_ Transaction Type : \_\_\_\_\_

1st Loan Amount \$ \_\_\_\_\_ 1st LTV \_\_\_\_\_ % 1st Int Rate : \_\_\_\_\_ TERM : \_\_\_\_\_

2nd Loan Amount \$ \_\_\_\_\_ 2nd LTV \_\_\_\_\_ % 2nd Int Rate : \_\_\_\_\_ TERM : \_\_\_\_\_

EQUITY IN PROPERTY : \$ \_\_\_\_\_ ALG Loan Fee : \_\_\_\_\_ Broker Points : \_\_\_\_\_ How many month's PMT to be held in reserve : \_\_\_\_\_

**Additional Notes:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Section III: ESCROW INFORMATION**

Escrow Company : \_\_\_\_\_ Escrow # : \_\_\_\_\_

Escrow Officer : \_\_\_\_\_ Phone # : \_\_\_\_\_

**Section VI: Broker Information**

Company Name : \_\_\_\_\_ Broker/Loan Officer : \_\_\_\_\_

Phone Number : \_\_\_\_\_ Contact Email : \_\_\_\_\_

Processor Name : \_\_\_\_\_ Processor Email : \_\_\_\_\_

Company NMLS # : \_\_\_\_\_ Company DRE # : \_\_\_\_\_

**\*BROKER FEES WILL ONLY BE PAID TO THE BROKER OR COMPANY SUBMITTING THE REFERRAL.  
THIS FORM MUST BE FULLY EXECUTED PRIOR TO INITIAL LOAN DISCLOSURES.**

**PLEASE UPLOAD DOCUMENTATION TO OUR SECURE DOCUMENT MANAGEMENT SYSTEM IN THE BROKER PORTAL**

. \*Upon receipt, the file will be reviewed and any missing items will be requested. Incomplete files will not be submitted for approval. \*Once the file is approved, an updated conditions list will be emailed with any outstanding conditions. Our approval is subject to the information presented on the Initial submission. Should the final package be different than the Initial submission, your loan terms, rate and approval might differ.

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