



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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