

FILLABLE PDF FORM MUST BE COMPLETED IN ITS ENTIRETY IN ORDER FOR PROCESSOR TO BEGIN WORK  
(incomplete files will cause delays and are not subject to turn around times)

BORROWER CREDIT SCORE			Please provide the necessary information on page 2 if we are disclosing your loan for you.	CO-BORROWER CREDIT SCORE		
EQUIFAX	EXPERIAN	TRANSUNION		EQUIFAX	EXPERIAN	TRANSUNION

### BROKER INFORMATION

Mortgage Company Name	Broker/Loan Officer Name	BROKER LO NMLS #
Processor Company Name	Broker/LO Email Address	Broker/LO Phone Number

### VENDOR INFORMATION

Title Company	Appraisal	Verifications	Homeowners Insurance
Contact/Escrow Agent	Date to Proceed with Order?	HR Contact for VOE	HOI Company
Email Address	FHA CASE #	Phone Number	Phone Number
Phone Number	MUST HAVE CC PAYMENT INFO AND AUTHORIZATION TO ORDER APPRAISAL	Email Address	Email Address
Has Title Been Ordered?		This information is helpful in expediting VOE	Insurance Agent (if known)

### REALTOR INFORMATION

Buyer's Agent and Name of Agency		Seller's Agent and Name of Agency	
Phone Number	Email Address	Phone Number	Email Address

### CHECKLIST

Everything listed below must be in the file to begin processing the loan.

<ul style="list-style-type: none"> <li><input type="checkbox"/> Loan is Registered with Lender</li> <li><input type="checkbox"/> Processing Fee (section B of LE)</li> <li><input type="checkbox"/> Lender Submission Form</li> <li><input type="checkbox"/> 3.2 file or PCF (Point file)</li> <li><input type="checkbox"/> Complete Fee Sheet</li> <li><input type="checkbox"/> Complete &amp; Accurate 1003</li> <li><input type="checkbox"/> Complete Anti-Steering Form</li> <li><input type="checkbox"/> Eligible Findings</li> <li><input type="checkbox"/> Credit Report</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Most recent 60 days bank statement (all pages)</li> <li><input type="checkbox"/> Most recent 30 days paystubs</li> <li><input type="checkbox"/> W-2s (past 2 years)</li> <li><input type="checkbox"/> Tax Returns if Self Employed (past 2 years)</li> <li><input type="checkbox"/> Identification/SS Card (on loans that require)</li> <li><input type="checkbox"/> Additional loan related docs</li> <li><input type="checkbox"/> Fully Executed Purchase Agreement (if purchase)</li> </ul>
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### FEES and Disclosure Information Needed

<b>Broker Compensation</b> _____%	___ <b>Broker Paid</b> ___ <b>Lender</b>	<b>Escrow Waiver</b> ___ YES ___ NO	Please provide disclosure information here or have your Calyx Fees Worksheet completed.	
<b>Loan Locked</b> ___ YES ___ NO    RATE _____%	_____ <b>Buyout Underwriting Fee</b> \$ _____ <b>Charge Underwriting Fee</b>	<b>Passed QM Requirements</b> ___ YES ___ NO	Interest Rate _____%	Check here for Doc-less Loan _____

### Loan Summary

<b>Borrower</b>		<b>Co-Borrower</b>	
Phone Number	E-Mail Address	Phone Number	E-Mail Address
Subject Property Address		City	State
		Zip Code	
<u>Transaction Type</u> ___ Purchase  ___ Refinance (rate/term)  ___ Refinance Cash Out	<u>Type of Home</u> ___ Single Family ___ Condo    ___ Attached    ___ Detached ___ PUD ___ Manufactured ___ Multi-Unit ___ Other		<b>Lender</b>  Loan Program (Conv, FHA, VA, USDA)  Program Name  Loan Number

### Tell Us About This Loan

In this section, please tell us about your loan. Please provide any and all information that will be helpful in expediting the processing of your loan.