



Loan Number: _____

Account Executive: _____ Account Manager: _____

Property Address: _____

CONTACT INFORMATION			
Broker Name		Processor Name	
Processor Phone Number		Processor Email	

SETTLEMENT AGENT INFORMATION / SIGNING DETAILS			
Settlement Agent Name		Settlement Agent Phone Number	
Title Company		Title Company Phone Number	
Email Address for Docs			
Loan Closing In Trust? <input type="checkbox"/> Yes <input type="checkbox"/> No		POA? <input type="checkbox"/> Yes <input type="checkbox"/> No	
All Trust Docs must be approved prior to documents being drawn		POA Name _____	**All POA's must be approved prior to documents being drawn**
Doc Signing Date		Doc Signing Time	
Vesting			

LOAN INFORMATION			
Borrower Name		Co-Borrower Name	
Non-Borrowing Spouse Name		First Payment Date	
Interest Credit? <input type="checkbox"/> Yes <input type="checkbox"/> No		Occupancy Type	
Must fund w/in 7 calendar days into the month		Purpose of Loan	
Loan Amount		Loan Type	
Loan Program		Impounds	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lock Expiration Date		UFMIP / USDA Guaranty Fee / VA Funding Fee:	<input type="checkbox"/> Cash <input type="checkbox"/> Financed
Mortgage Insurance: <input type="checkbox"/> Borrower Paid <input type="checkbox"/> Lender Paid		Borrower Premium Rate Credit:	%
		Borrower Discount Points:	%

FEES		
Third Party Fee **Invoice Required**	POC	Total Due at Closing
Appraisal Fee	\$	\$
Credit Report	\$	\$
3rd Party Processing Fee	\$	\$
Other Fee	\$	\$

Borrower Paid Compensation	Lender Paid Compensation
(+) Broker Origination \$	Lender Paid Broker Compensation \$
(+) 3rd Party Processing Fee \$	(+) 3rd Party Processing Fee \$
(+) Reimbursement for Appraisal \$	(+) Reimbursement for Appraisal \$
(+) Reimbursement for Credit Report \$	(+) Reimbursement for Credit Report \$
TOTAL \$ CHECK TO BROKER: \$	TOTAL \$ CHECK TO BROKER: \$

