



ACCOUNT EXECUTIVE \_\_\_\_\_

**BROKER INFORMATION**

Company Name: \_\_\_\_\_

**BROKER COMPENSATION**

Borrower Paid  Lender Paid

Loan Officer: \_\_\_\_\_

Email: \_\_\_\_\_

**BORROWER**

Name: \_\_\_\_\_

**TRANSACTION**

- Purchase
- R/T Refinance
- Cashout
- Debt Consolidation

**OCCUPANCY**

- Primary
- 2nd Home
- Investment

**AMORTIZE**

- 30 Year Fixed
- 25 Year Fixed
- 20 Year Fixed
- 30/40 Yr  /O
- 3/1 ARM  /O
- 5/1 ARM  /O
- 7/1 ARM  /O
- 10/1 ARM  /O

**PROPERTY TYPE**

- Detached SFR
- Attached SFR
- Condo
- Non-Warrantable Condo
- 2-4 Unit  PUD

**LOAN VALUE**

Purchase Price: \$\_\_\_\_\_.

Appraised Value: \$\_\_\_\_\_.

Loan Amount: \$\_\_\_\_\_.

LTV: \_\_\_\_\_%

CLTV: \_\_\_\_\_%

**DOCUMENTATION TYPE**

**DOCUMENTATION**

- Full Doc  1099 only 1 year
- P&L only  1099 only 2 years
- NIVA  12 months personal
- Asset Depletion  12 months business
- 1 year Alt Doc  24 months personal
- 24 months business

**CITIZENSHIP**

- US Citizen
- Perm Resident
- Non-Perm Resident
- Foreign National
- ITIN

**BROKER COMMENTS** Please share any income concerns or questions you may have and include other helpful information.

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**Please upload 3.2 file, 1008, 1003 and credit report.**