APPLICATION DATE

LOAN OFFICER | PHONE | EMAIL

SUBJECT PROPERTY INFORMATION

STREET ADDRESS

CITY | STATE | ZIP CODE

LOAN PURPOSE: Select | OCCUPANCY TYPE: Select | PROPERTY TYPE: Select | UNITS: Select | IMPOUND: Select

LOAN AMOUNT | PURCHASE PRICE | APPRAISAL VALUE

QM

MORTGAGE TYPE: Select | AMORTIZATION: Select

NON-QM

MORTGAGE TYPE: Select | AMORTIZATION: Select

FOR PURCHASE TRANSACTION

ESCROW CLOSING DATE | LOAN CONTINGENCY REMOVAL DATE | EMD

CONTACT INFORMATION FOR REALTORS

SELLING AGENT | PHONE | EMAIL

LISTING AGENT | PHONE | EMAIL

ESCROW COMPANY

ESCROW OFFICER | PHONE | EMAIL

NOTE TO UNDERWRITER

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BORROWER INFORMATION

FULL NAME

SOCIAL SECURITY NUMBER | PHONE NUMBER | EMAIL ADDRESS

DATE OF BIRTH | MARITAL STATUS: Select | CITIZENSHIP: Select

PRESENT ADDRESS | YEARS AT ADDRESS | CURRENT MORTGAGE PAYMENT / MO.

If you have occupied your current address for less than 2 years, list your previous address below.

PREVIOUS ADDRESS | YEARS

CURRENT EMPLOYER NAME | START DATE

CURRENT EMPLOYER ADDRESS | POSITION | EMPLOYER PHONE

Complete the following if you have worked less than 2 years at your current workplace.

FORMER EMPLOYER NAME | START DATE | END DATE

FORMER EMPLOYER ADDRESS | POSITION | EMPLOYER PHONE

CO-BORROWER INFORMATION

FULL NAME

SOCIAL SECURITY NUMBER | PHONE NUMBER | EMAIL ADDRESS

DATE OF BIRTH | MARITAL STATUS: Select | CITIZENSHIP: Select

PRESENT ADDRESS | YEARS AT ADDRESS | CURRENT MORTGAGE PAYMENT / MO.

If you have occupied your current address for less than 2 years, list your previous address below.

PREVIOUS ADDRESS | YEARS

CURRENT EMPLOYER NAME | START DATE

CURRENT EMPLOYER ADDRESS | POSITION | EMPLOYER PHONE

Complete the following if you have worked less than 2 years at your current workplace.

FORMER EMPLOYER NAME | START DATE | END DATE

FORMER EMPLOYER ADDRESS | POSITION | EMPLOYER PHONE

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ASSET INFORMATION

NAME OF BANK | ACCOUNT NUMBER | BALANCE

ACCOUNT TYPE ☐ Checking ☐ Saving ☐ CD ☐ Other

NAME OF BANK | ACCOUNT NUMBER | BALANCE

ACCOUNT TYPE ☐ Checking ☐ Saving ☐ CD ☐ Other

NAME OF BANK | ACCOUNT NUMBER | BALANCE

ACCOUNT TYPE ☐ Checking ☐ Saving ☐ CD ☐ Other

REAL ESTATE OWNED

PROPERTY ADDRESS

OCCUPANCY ☐ Second Home ☐ Investment

EST. VALUE | EXISTING LOAN | MTG. PAYMENT | RENTAL INCOME

PROPERTY ADDRESS

OCCUPANCY ☐ Second Home ☐ Investment

EST. VALUE | EXISTING LOAN | MTG. PAYMENT | RENTAL INCOME

PROPERTY ADDRESS

OCCUPANCY ☐ Second Home ☐ Investment

EST. VALUE | EXISTING LOAN | MTG. PAYMENT | RENTAL INCOME

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INITIAL SUBMISSION PACKAGE

- Loan Application
- Credit Card Authorization (attached form)

- Driver's License
- Social Security Card
- Green Card — Front & Back (permanent resident only)
- EAD Card — Front & Back (non-permanent resident only)

- 2 Yrs W-2 (Salary)
- 2 Pay Stubs — most recent, covering last 30 days
- 2 Yrs Personal Tax Returns (Form 1040)
- 2 Yrs Business Tax Returns (1120, 1120S + K-1, or 1065 + K-1)

- 2 Most Recent Bank Statements (checking and/or saving)
- Any Other Asset — if available (CD, mutual fund, stocks, 401-K, etc.)

IF ANY REO'S ARE OWNED

- Hazard Insurance Information (company name & contact info)
- HOA Information (if condo)
- Mortgage Statement — if applicable (real estate owner only)
- Property Tax Bill

FOR PURCHASE TRANSACTIONS

- Fully Executed Purchase Agreement
- EMD Receipt with Wire Detail Information

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