

Loan Type		Loan Program (select Loan Type first)			
Broker Name		Account Executive Name			
Loan Officer Information		Processor Information			
Name		Name			
Email		Email			
Phone		Phone			
Borrower Information		Co-Borrower Information			
Name		Name			
Email		Email			
Broker Compensation (LPC OR BPC) + Processing Fee					
LPC: (Choose \$ or %)	\$	%	BPC: (Choose \$ or %)	\$	%
			Flat FEE	\$	
Loan Information					
Transaction Type		Loan Amount			
Loan Term		Property Value			
Expected Rate		%	Property Type		
Pre-Locked Conf. & Govt. Only	<input type="checkbox"/>	LTV	%	CLTV	%
Occupancy		Impounds		Fee Buy Out	
3 rd Party Processing Fee Must provide invoice @ submission	\$	Est. Closing Date			
Closing Agent Information					
Company		Phone			
Agent		Email			
Minimum Submission Requirements					
Conforming & FHA/VA			Jumbo & Non QM		
<input type="checkbox"/> Completed Submission Form	<input type="checkbox"/> Credit Report ≤ 60 Days		<input type="checkbox"/> Completed Submission Form	<input type="checkbox"/> Credit Report ≤ 30 Days	
<input type="checkbox"/> FNMA 3.4 exported	<input type="checkbox"/> 3 rd Party Invoice (if applicable)		<input type="checkbox"/> FNMA 3.4 exported	<input type="checkbox"/> 3 rd Party Invoice (if applicable)	
<input type="checkbox"/> Est. Settlement Statement – If not provided Smart Fees will be used	<input type="checkbox"/> Borrower's Authorization Signed and Dated Prior to Credit Report		<input type="checkbox"/> Drivers License & Soc. Sec. Card	<input type="checkbox"/> Est. Settlement Statement	
			<input type="checkbox"/> PriceGen or GenQual Form	<input type="checkbox"/> Bank Statement Package (if app.)	