



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

Broker:		LO Name:	
Broker Contact:		Broker Contact Phone:	
Broker Contact Email:			
Contract Processing? Y <input type="checkbox"/> or N <input type="checkbox"/> IF Yes NMLS#:		Fee:	Must provide invoice
Call Before Pulling New Credit/AUS? Yes <input type="checkbox"/> No <input type="checkbox"/>			
Compensation: Lender Paid <input type="checkbox"/> or Borrower Paid <input type="checkbox"/>			
Underwriting Fee in the Rate? Y <input type="checkbox"/> or N <input type="checkbox"/>			
VA- Veteran Exempt? Y <input type="checkbox"/> or N <input type="checkbox"/>			
Borrower Name:		SSN:	
Co-Borrower Name:		SSN:	
Borrower Email:			
Co-Borrower Email:			
Property Address:			
PROGRAM:		TERM:	FIX/ARM:
PURPOSE:		PROPERTY TYPE:	
MID CREDIT SCORE:	ESCROWS: Y <input type="checkbox"/> N <input type="checkbox"/>	W2 Transcript Only : Y <input type="checkbox"/> N <input type="checkbox"/>	
PROPERTY ADDRESS:			
SALES PRICE:		PROPERTY VALUE:	
LOAN AMOUNT:		LTV:	CLTV:
Mortgage Insurance Type:		NOTE RATE:	

<p><b>Minimum Submission Requirements:</b></p> <ul style="list-style-type: none"> <li>➤ 1003/1008</li> <li>➤ Broker Credit Report</li> <li>➤ Income Documentation (dated w/in 60 days) <ul style="list-style-type: none"> <li>Current Paystubs (30 days of coverage)</li> <li>SSI or Pension Award Letters</li> <li>2 Years W2's and/or Tax Returns</li> </ul> </li> <li>➤ Asset Documentation (dated w/in 60 days) <ul style="list-style-type: none"> <li>Most Recent 2 Month's Statements</li> <li>Gift Documentation (if Applicable)</li> </ul> </li> <li>➤ Preliminary Title Report</li> <li>➤ Purchase contract (if Applicable)</li> <li>➤ Mortgage Note/Payment Coupon (Refi Only)</li> <li>➤ Proof of Insurance</li> </ul> <p>FHA:</p> <ul style="list-style-type: none"> <li>➤ Case Request Form</li> <li>➤ 92900A (1003 Addendum)</li> <li>➤ Streamline - Mortgage Only Credit w/ 3 Scores</li> </ul> <p>VA:</p> <ul style="list-style-type: none"> <li>➤ Case Request form/VA Appraisal Order</li> <li>➤ VA 26-1880 or Certificate of Eligibility</li> <li>➤ Military ID Cards</li> <li>➤ Nearest Living Relative and Child Care Stmtns.</li> </ul>	<p><b>Minimum Disclosure Requirements:</b></p> <p>We Disclose</p> <ul style="list-style-type: none"> <li>➤ 1003/92900A <u>Dated Within 24 Hours</u></li> <li>➤ Credit Authorization &amp; Broker Credit Report</li> <li>➤ Service Provider List</li> <li>➤ Estimated Closing Statement from Title/Escrow</li> <li>➤ NO other disclosures may be submitted</li> </ul> <p>Broker Disclose</p> <ul style="list-style-type: none"> <li>➤ Broker Full Set of State Specific Disclosures</li> <li>➤ Accurate LE</li> <li>➤ Estimated Closing Statement from Title/Escrow</li> <li>➤ Intent to Proceed</li> <li>➤ Service Provider List</li> <li>➤ Anti Steering Form</li> <li>➤ Form 4506T *Do NOT provide on ALT DOC <i>First page of tax returns for all borrowers is highly recommended</i></li> <li>➤ Homeownership Counseling Disclosure</li> </ul> <p>FHA ID: 20996-0000-1 VA ID: 169917-00-00</p> <p>Mortgagee Clause: OCMBC, Inc. ISAOA 19000 MacArthur Blvd., Suite 200 Irvine, CA 92612</p>
---	---