

**Broker Information**

Company Name		Account Executive	
Loan Officer Name		Loan Officer E-mail	
Loan Processor Name		Loan Processor E-mail	
Contract Processor/Company		Contract Processor NMLS #	
Contract Processor Fee \$		Broker owned Escrow or other Affiliates?	<input type="checkbox"/> No <input type="checkbox"/> Yes (Must disclose on LE)
Contract Processor E-mail		Affiliate charge \$	

**Borrower Information**

Borrower Name		Co-Borrower	
Borrower E-mail		Co-Borrower E-mail	
Subject Address		City	Zip Code

**Loan Information**

<b>PURPOSE</b> <input type="checkbox"/> Purchase <input type="checkbox"/> Refi Rate/Term <input type="checkbox"/> Cash Out <input type="checkbox"/> Streamline Refi	<b>OCCUPANCY</b> <input type="checkbox"/> Primary <input type="checkbox"/> 2 <sup>nd</sup> Home <input type="checkbox"/> Investment	<b>PROPERTY</b> <input type="checkbox"/> SFR <input type="checkbox"/> PUD <input type="checkbox"/> 2 Unit <input type="checkbox"/> 3-4 Unit <input type="checkbox"/> Condo	<b>LOAN TYPE</b> <input type="checkbox"/> 30 yr <input type="checkbox"/> 10/1 <input type="checkbox"/> 25 yr <input type="checkbox"/> 7/1 <input type="checkbox"/> 20 yr <input type="checkbox"/> 5/1 <input type="checkbox"/> 15 yr <input type="checkbox"/> 3/1 <input type="checkbox"/> 10 yr	<b>MI</b> <input type="checkbox"/> Single Premium <input type="checkbox"/> Monthly <input type="checkbox"/> Annually <input type="checkbox"/> LPMI	<b>LOAN PRODUCT</b> <input type="checkbox"/> FHA <input type="checkbox"/> FHA Streamline <input type="checkbox"/> VA IRRRL <input type="checkbox"/> VA <input type="checkbox"/> Conventional FNMA (DU) <input type="checkbox"/> Conventional Freddie Mac (LP) <input type="checkbox"/> HomeReady <input type="checkbox"/> Home Possible <input type="checkbox"/> Jumbo	<b>DOC TYPE</b> <input type="checkbox"/> Full Doc <input type="checkbox"/> W-2 Only
Loan Amount:						
Rate: _____						

**Compensation**

Fee Buy Out: <input type="checkbox"/> Yes <input type="checkbox"/> No	Lender Paid:	Borrower Paid:
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**Credit Report**

Re-issue Broker Credit (Please see our approved credit vendors [https://www.pcfwholesale.com/wp-content/docs/Approved\\_Credit\\_Vendors.pdf](https://www.pcfwholesale.com/wp-content/docs/Approved_Credit_Vendors.pdf)):

Lender Pull New Credit

**Required Documentation**

- Initial 1003 signed and dated by all borrower(s) and broker (MLO)
- Itemized Fee Worksheet and complete Settlement Provider List
- Intent to Proceed
- Borrower Authorization signed and dated
- Credit Report (*dated within 60 days of submission*) and Inquiry Letter for all inquiries (*per Credit Report*)
- IRS 4506-T form, completed and signed by the borrower
- Income Documentation
  - Wage earner- 30 days' worth of paystubs and most recent 2 years W2's
  - Self-employed- most recent 2 years tax returns
- Asset Documentation based on program/product
- Anti-Steering form
- Prelim Title Report with plat map and wire instructions, if available
- Purchase Only: Executed Purchase Contract (*cannot be expired*) signed by all parties with all addendums, if applicable
- Refinance Only: Payoff Statement
- FHA Case # if applicable
- VA case # if applicable
- VA Forms:
  - NTB & IRRRL Rate reduction (Lender disclosed) Provide first payment date, loan amount, rate and term
  - NTB & IRRRL Rate reduction (Broker disclosed) Provide completed & signed form by borrower(s)
- Appraisal if applicable
- State specific disclosures (Broker disclosed)

\*\*Disclosures only require an Initial 1003 signed by the LO, Fee sheet, SSPL, and Credit Authorization

Notes: \_\_\_\_\_

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