

Conventional Loan Submission

CLIENT INFORMATION

COMPANY NAME	DISTRICT DIRECTOR
LOAN OFFICER	LO EMAIL
PROCESSOR	PROCESSOR EMAIL
CONTACT PHONE	OTHER CONTACT
AFFILIATE CHARGES	AFFILIATE NAME
☐ Yes ☐ No	

LOAN INFORMATION

RATE LOCK				☐ Lender Paid	☐ Borrower Paid	☐ Locked	☐ Floating
NO FEE OPTION							
LOAN PURPOSE	LOAN AMOUNT (\$)	SALES PRICE (\$)					
OCCUPANCY STATUS	INTEREST RATE (%)	LTV	CLTV				
MORTGAGE INSURANCE (REQUIRED > 80% LTV)				☐ Yes	☐ No		
IF YES, MI TYPE				MI PROVIDER			

DISCLOSURE DELIVERY METHOD

Method of Delivery — Initial Loan Estimate				
☐ Emailed	☐ Mailed	☐ Hand Delivered	☐ E-Delivered	☐ Other
Method of Delivery — Loan Estimate #2 — 3 days required if postal mail				
☐ Emailed	☐ Mailed	☐ Hand Delivered	☐ E-Delivered	☐ Other

PURCHASE AGREEMENT CONTACT INFORMATION

Buyer's Side	Seller's Side
REAL ESTATE COMPANY	REAL ESTATE COMPANY
STATE LICENSE ID	STATE LICENSE ID
REAL ESTATE AGENT	REAL ESTATE AGENT
AGENT STATE LICENSE ID	AGENT STATE LICENSE ID
MAILING ADDRESS	MAILING ADDRESS
AGENT EMAIL	AGENT EMAIL
AGENT PHONE NUMBER	AGENT PHONE NUMBER

DOCUMENTATION CHECKLIST (IF APPLICABLE)

- Purchase Agreement
 - Credit Report
 - Supplemental Credit Report
 - VOM's and VOR's
 - LOX notes to UW
 - AUS Findings — released to GMFS
 - Fee Worksheet
 - 1003 — initial
 - 1003 — updated
 - LOX from borrower(s) for derogatory credit & inquiries
 - Executed disclosures**
 - Borrower(s) most recent VOE's, W-2s, paystubs
 - Borrower(s) misc. income docs — child support,SSI, etc.
 - Asset documentation
 - Gift Letter
- Payoffs
 - Title
 - HOI Dec Page
 - Flood Dec Page
 - Cancelled EMD Check
 - Termite Cert
 - HOA Cert
 - HVCC Cert
 - Appraisal
 - 2nd Appraisal
 - UCDP Reports
 - Rate Lock
 - BK, Divorce, etc. docs
 - 2nd Mortgage Note

Please upload the completed form via the broker portal and attach all required documents — upload as Full Package Initial (portal).

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