

Submit by uploading 3.4 to our portal, along with a submission package
 Contact your Account Manager for directions on 3.4 upload and broker portal registration process

Estimated Closing Date: _____

Account Executive Name: _____

Submission Date: _____

Primary Borrower Name: _____

Email: _____

Co-Borrower Name: _____

Email: _____

Property Address: _____

Broker Information

Company Name: _____ Company NMLS ID: _____ State Lic. No.: _____

LO Name: _____ LO Phone: _____ LO Email: _____

Processor Name: _____ Processor Phone: _____ Processor Email: _____

Loan Information

Loan Amount (2nd): _____ Appraised Value: _____

Mortgage Balance (1st): _____ Purchase Price: _____

HCLTV: _____ Interest Rate: _____ Qualifying Credit Score: _____

Loan Purpose: _____ Occupancy: _____ Property Type: _____

Doc Type: _____ Amortization: _____ Lock # of Days: _____

Processing Fee: \$ _____ Broker Comp: _____ % + \$ _____ = \$ _____
 (\$495 Max Processing Fee) (BPC cannot go above LPC)

Title/Escrow Company Information

Reference/Escrow #: _____ Company Name: _____ Company Phone: _____

Contact Name: _____ Contact Email: _____

Appraisal Information

Yes	No
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Supplying an already completed Appraisal within 12 months? (NOO only)

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Loan Purpose Questionnaire

Yes	No
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1 Is any portion of the loan being used to purchase another property?

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2 Will any portion of the proceeds of this loan be used for home improvement purposes?

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3 Is any portion of this loan being used to pay off an existing mortgage?

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4 Will you be using the proceeds for something other than the 3 purposes listed above (purchase, refi, home improvement)?

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Required Documents for Registration

- FNMA 3.4 MISMO Data File
- 1003/1008 Application (PDF only)
- Submission Form
- Tri Merge Credit Report (within 90 days)
- All applicable Income Documents
 - Paystubs, W-2's, Written VOE, Tax Returns
 - 12 or 24-Month Bank Statements
- Fully Executed Purchase Agreement (purchase transactions only)
- Estimated Settlement Statement / Master Settlement Statement
- Property Profile

Other High Priority Documents

- Mortgage Statements and proof of Taxes, Insurance and HOA Dues, if not escrowed (any other properties)
- Appraisal (XML format)
- Title Work – Short Form ALTA Policy
- Insurance Binder on Subject Property
- Original Note