

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 (2<sup>nd</sup>): \_\_\_\_\_ Appraised Value: \_\_\_\_\_

Mortgage Balance (1<sup>st</sup>): \_\_\_\_\_ 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

Supplying an already completed Appraisal within 12 months? (NOO only)

### Loan Purpose Questionnaire

Yes No

1	Is any portion of the loan being used to purchase another property?		
2	Will any portion of the proceeds of this loan be used for home improvement purposes?		
3	Is any portion of this loan being used to pay off an existing mortgage?		
4	Will you be using the proceeds for something other than the 3 purposes listed above (purchase, refi, home improvement)?		

## 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