

REFERRAL PARTNER

Name		Mobile Number	
Company		Email	
Who is submitting?	<input type="checkbox"/> Borrower <input type="checkbox"/> Escrow <input type="checkbox"/> Mortgage Broker <input type="checkbox"/> Realtor		

BORROWER INFORMATION

	BORROWER	CO-BORROWER
Borrower		
Experience	<input type="checkbox"/> Experienced (4+) <input type="checkbox"/> Limited (1-3) <input type="checkbox"/> None (0)	<input type="checkbox"/> Experienced (4+) <input type="checkbox"/> Limited (1-3) <input type="checkbox"/> None (0)
Credit Score	<input type="checkbox"/> 720+ <input type="checkbox"/> 660-719 <input type="checkbox"/> 620-659 <input type="checkbox"/> 580-619 <input type="checkbox"/> 500-579 <input type="checkbox"/> <500	<input type="checkbox"/> 720+ <input type="checkbox"/> 660-719 <input type="checkbox"/> 620-659 <input type="checkbox"/> 580-619 <input type="checkbox"/> 500-579 <input type="checkbox"/> <500
Foreclosure	<input type="checkbox"/> None <input type="checkbox"/> < 12 Mo. <input type="checkbox"/> 12+ Mo. <input type="checkbox"/> 24+ Mo. <input type="checkbox"/> 36+ Mo.	<input type="checkbox"/> None <input type="checkbox"/> < 12 Mo. <input type="checkbox"/> 12+ Mo. <input type="checkbox"/> 24+ Mo. <input type="checkbox"/> 36+ Mo.
Bankruptcy	<input type="checkbox"/> None <input type="checkbox"/> < 12 Mo. <input type="checkbox"/> 12+ Mo. <input type="checkbox"/> 24+ Mo. <input type="checkbox"/> 36+ Mo.	<input type="checkbox"/> None <input type="checkbox"/> < 12 Mo. <input type="checkbox"/> 12+ Mo. <input type="checkbox"/> 24+ Mo. <input type="checkbox"/> 36+ Mo.
Non-Entity Borrower	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Citizenship	<input type="checkbox"/> US Citizen <input type="checkbox"/> Permanent Resident (Green Card) <input type="checkbox"/> Non-Permanent Resident	<input type="checkbox"/> US Citizen <input type="checkbox"/> Permanent Resident (Green Card) <input type="checkbox"/> Non-Permanent Resident
Total Cash & Liquid Reserves		
Borrower Net Worth		

PROPERTY PARAMETERS

Subject Property Address			
Purpose of Loan	<input type="checkbox"/> Purchase <input type="checkbox"/> Refinance <input type="checkbox"/> Refinance C/O		
Type of Loan	<input type="checkbox"/> Rehab 85% LTC <input type="checkbox"/> Ground-up 85% LTC <input type="checkbox"/> Fix & Flip <input type="checkbox"/> Residential Bridge <input type="checkbox"/> MF / Comm Bridge <input type="checkbox"/> Land <input type="checkbox"/> Non QM		
Property Type	<input type="checkbox"/> SFR <input type="checkbox"/> Condo <input type="checkbox"/> Townhome <input type="checkbox"/> PUD <input type="checkbox"/> Commercial <input type="checkbox"/> Mixed Use <input type="checkbox"/> Industrial <input type="checkbox"/> Land <input type="checkbox"/> 2-4 Units <input type="checkbox"/> 5+ Units		
Purchase Transaction Type	<input type="checkbox"/> REO <input type="checkbox"/> Standard <input type="checkbox"/> Foreclosure <input type="checkbox"/> Probate <input type="checkbox"/> Trustee Sale <input type="checkbox"/> Short Sale		
Intended Occupancy	<input type="checkbox"/> Primary Res <input type="checkbox"/> Second Home <input type="checkbox"/> Investment Property	Use of Funds	<input type="checkbox"/> Business <input type="checkbox"/> Personal <input type="checkbox"/> Both
# of Units	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10+	Transaction Type	<input type="checkbox"/> Commercial <input type="checkbox"/> Residential
Purchase Price		Suburban / Rural	<input type="checkbox"/> Suburban <input type="checkbox"/> Rural
Purchase Date		Preferred Close Date	
Purchase Status	<input type="checkbox"/> Inquiry <input type="checkbox"/> Offered <input type="checkbox"/> Accepted	Occupancy at COE	<input type="checkbox"/> Vacant <input type="checkbox"/> Rented <input type="checkbox"/> Squatter <input type="checkbox"/> Eviction Needed <input type="checkbox"/> Owner Occupied
Reno Budget		Special Notes	
Sq. Ft. Adding			
Market Value			
AR Value			

IF A REFINANCE COMPLETE THE FOLLOWING:

LIEN POSITION	LENDER	BALANCE	RATE	OPTIONS
<input type="checkbox"/> 1st TD <input type="checkbox"/> 2nd TD <input type="checkbox"/> 3rd TD				
<input type="checkbox"/> 1st TD <input type="checkbox"/> 2nd TD <input type="checkbox"/> 3rd TD				
<input type="checkbox"/> 1st TD <input type="checkbox"/> 2nd TD <input type="checkbox"/> 3rd TD				
<input type="checkbox"/> 1st TD <input type="checkbox"/> 2nd TD <input type="checkbox"/> 3rd TD				

CROSS COLLATERAL INFORMATION

Subject Property Address			
Purchase Price		Reno Budget	
Purchase Date		Sq. Ft. Adding	
Purchase Status	<input type="checkbox"/> Inquiry <input type="checkbox"/> Offered <input type="checkbox"/> Accepted	Market Value	
Purchase Transaction Type	<input type="checkbox"/> REO <input type="checkbox"/> Standard <input type="checkbox"/> Foreclosure <input type="checkbox"/> Probate <input type="checkbox"/> Trustee Sale <input type="checkbox"/> Short Sale	AR Value	
1st TD		Intended Occupancy	<input type="checkbox"/> Primary Residence <input type="checkbox"/> Second Home <input type="checkbox"/> Investment Property
2nd TD		Rental Income	

LOAN REQUEST

Lien Position	<input type="checkbox"/> 1st TD <input type="checkbox"/> 2nd TD <input type="checkbox"/> 3rd TD	Broker Points	
Loan Amount Requested		Broker Processing	
Loan Term Requested	<input type="checkbox"/> I/O due 6 mo <input type="checkbox"/> I/O due 1 yr <input type="checkbox"/> I/O due 2 yrs <input type="checkbox"/> I/O due 3 yrs <input type="checkbox"/> I/O due 5 yrs <input type="checkbox"/> 30 yr fixed	Referral Partner Licensing?	<input type="checkbox"/> _____ <input type="checkbox"/> BRE Sales <input type="checkbox"/> BRE Broker <input type="checkbox"/> None
Interest Rate Requested	<input type="checkbox"/> Inquiry <input type="checkbox"/> Offered <input type="checkbox"/> Accepted	Referral Partner - Paid To	
Mortgage Payment Type	<input type="checkbox"/> Interest Only Payment <input type="checkbox"/> Fully Amortized Payment		
Prepayment Penalty	<input type="checkbox"/> 3 month <input type="checkbox"/> 6 month <input type="checkbox"/> 9 month <input type="checkbox"/> 12 month <input type="checkbox"/> None		