

CONTACT INFORMATION

Company: _____ Account Executive: _____
 Loan Officer: _____ Account Manager: _____
 LO Email: _____ Loan Officer Ph: _____
 Loan Processor: _____ Loan Processor Ph: _____
 LP Email: _____

REQUESTED LOAN TERMS

Submission Type: Full Submission Disclosures Only Disclosures By: Broker Lender
 Loan Application Date: _____ Estimated Closing Date: _____
 Borrower: _____ Co-borrower: _____
 Borr. Email: _____ Cobo. Email: _____
 Subject Property: _____
 Program: Conventional FHA FHA DPA USDA VA 2/1 Buydown CalHFA
 Product:
 1st Loan Amount: _____ 1st Loan LTV _____ 2nd Loan Amount: _____ 2nd Loan LTV _____
 Appraised (Est) Value: _____ Loan Purpose: _____ Concurrent Second
 Interest Rate: _____ Loan Term: _____ Purchase Price: _____
 Loan Type: _____ If CalHFA, Borrower Has: Pre-approval Lottery Voucher
 Occupancy: _____ Property Type: _____
 Condo Project Name: _____
 Mtg. Insurance: _____ Lender Fee Buyout? Yes No Impounds? Yes No
 Credit Report*: Pull new credit Use attached Broker credit AUS Type: DU LP (Forward Lending will pull credit)
 DU Credit Credentials: User Name _____ Password _____
 *If credit option not selected, Forward Lending will pull new credit. FHA Condo Spot Approval Request? Yes No

BROKER COMPENSATION

Comp. Type: Borrower Paid Lender Paid If Borrower Paid, Amount: _____
 In-house Processing Fee: Yes No Affiliated Broker Fees: Yes No
 Processing Fee: _____ In-house (BPC Only) 3rd Party 3rd Party NMLS ID: _____
 Disclose with Smart Fees? Yes No

REQUIRED DOCUMENTATION CHECKLIST

- Completed Wholesale Submission Form
- Completed 1008 (if applicable)
- Completed 1003, signed/dated by Borrower(s) and Loan Officer (if applicable, REO section must be thoroughly completed)
- Credit Report for All Borrowers and Non-borrowing Spouse (if applicable) if using Broker credit reports
- Borrower's Certification and Authorization (aka Broker Disclosures)
- Initial Fees Worksheet
- eConsent from Borrower(s) if any documents are eSigned
- All Broker-specific disclosures required per state regulations and transaction type; if applicable, Dual Role Disclosure
- Purchase: Purchase Agreement with all Addendums (if applicable)
- FHA:** FHA 92900A, pages 1 & 2, fully executed
- FHA Fast 100+:** Completed 1003 required for the 2nd TD
- FHA/VA:** Streamline Mortgage Only Credit Report
- VA:** VA Form 26-1802A fully executed by Borrower(s) and Loan Originator
- VA:** VA Certificate of Eligibility (COE)
- VA Refinance:** VA Refinance Loan Comparison Disclosure (see Forms on Forward Lending TPO Portal) and Mortgage Note
- VA IRRRL:** VA 26-8923 Interest Rate Reduction Loan Worksheet and VA IRRRL Loan Comparison
- USDA:** Request for Single Family Housing Loan Guarantee (Form RD 3555-21)

Income Documentation Requirements

- Wage Earner:** Most recent 30 days paystubs, all borrowers (or as required per AUS) OR last 2 years W2s, all borrowers
- Self-employed:** 2 Years 1099s (as applicable), All K1s (as applicable), Tax returns (1 or 2 Years, based on program)
- Retired:** Award Letter, Retirement Statement, 1099s, or recent bank statement supporting retirement income

SUBMISSION NOTES

Mortgagee Clause:
 OCMBC, Inc. ISAOA
 19000 MacArthur Blvd., Suite 200
 Irvine, CA 92612
 Lender IDs:
 FHA: 20996-0000-1
 VA: 169917-00-00

Forward Lending Contacts:
 for General Inquiries
 Corporate Office Phone: (800) 760-1833
 Lock Desk Email:
lockdesk@forwardlendingmtg.com
 UW Scenario Desk:
scenarios@forwardlendingmtg.com



Corporate Office:
 19000 MacArthur Blvd., Suite 300
 Irvine, CA 92612
 NMLS ID #2125
www.ForwardLendingMtg.com