

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

BROKER COMPENSATION	
Comp. Type: <input type="checkbox"/> Borrower Paid <input type="checkbox"/> Lender Paid	If Borrower Paid, Amount: _____
In-house Processing Fee: <input type="checkbox"/> Yes <input type="checkbox"/> No	Affiliated Broker Fees: <input type="checkbox"/> Yes <input type="checkbox"/> No
Processing Fee: _____	<input type="checkbox"/> In-house (BPC Only) <input type="checkbox"/> 3rd Party
Disclose with Smart Fees? <input type="checkbox"/> Yes <input type="checkbox"/> No	3rd Party NMLS ID: _____

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

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

SUBMISSION NOTES

<p>Mortgagee Clause: OCMBC, Inc. ISAOA 19000 MacArthur Blvd., Suite 200 Irvine, CA 92612 Lender IDs: FHA: 20996-0000-1 VA: 169917-00-00</p>	<p>Forward Lending Contacts: <i>for General Inquiries</i> Corporate Office Phone: (800) 760-1833 Lock Desk Email: lockdesk@forwardlendingmtg.com UW Scenario Desk: scenarios@forwardlendingmtg.com</p>	 <p>Corporate Office: 19000 MacArthur Blvd., Suite 300 Irvine, CA 92612 NMLS ID #2125 www.ForwardLendingMtg.com</p>
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