

CONTACT INFORMATION

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

REQUESTED LOAN TERMS

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|---|--|---|--|--|--|
| 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: | Purchase Price: | | |
| Loan Type: | | If CalHFA: | <input type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> MyHome <input type="checkbox"/> MyHome+ZIP | | |
| CalHFA Temporary Buydown: | <input type="checkbox"/> Yes <input type="checkbox"/> No | | If Yes: | | |
| Occupancy: | | | Property Type: | | |
| Condo Project Name: | | | | | |
| Mtg. Insurance: | | Lender Fee Buyout? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Impounds? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Credit Report*: | <input type="checkbox"/> Pull new credit <input type="checkbox"/> Use attached Broker credit | | AUS Type: | <input type="checkbox"/> DU <input type="checkbox"/> 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? | | |
| | | | <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 | 3rd Party NMLS ID: | |
| Disclose with Smart Fees? | <input type="checkbox"/> Yes <input type="checkbox"/> 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

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|--|---|---|
| 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 | <div>FORWARD LENDING</div> <div></div> <div>Corporate Office: 19000 MacArthur Blvd., Suite 300 Irvine, CA 92612 NMLS ID #2125 www.ForwardLendingMtg.com</div> |
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