

CONTACT INFORMATION

Company: Account Executive:

Account Manager:

Loan Officer: Loan Officer Ph:

LO Email:

Loan Processor: Loan Processor Ph:

LP Email:

REQUESTED LOAN TERMS

Submission Type: ☐ Full Submission ☐ Disclosures OnlyDisclosures 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:

CalHFA Temporary Buydown: ☐ Yes ☐ No If Yes:

Occupancy: Property Type:

Condo Project Name:

Mtg. Insurance: Lender Fee Buyout? ☐ Yes ☐ NoImpounds? ☐ Yes ☐ No

Credit Report*: ☐ Pull new credit ☐ Use attached Broker creditAUS Type: ☐ DU ☐ LP (Forward Lending will pull credit)

DU Credit Credentials: Username 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 PaidIf Borrower Paid, Amount:

In-house Processing Fee: ☐ Yes ☐ NoAffiliated Broker Fees: ☐ Yes ☐ No

Processing Fee: ☐ In-house (BPC Only) ☐ 3rd Party3rd 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

FORWARD
LENDING



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