



WHOLESALE LENDING

# Expedited CD Request/Doc Order Request Form

Upload correspondence to the loan file  
For details and questions on how to use this form,  
contact your Account Executive or Account Manager

Request Date \_\_\_\_\_ Expedited CD (Prior to CTC) Loan Number \_\_\_\_\_ Lock Expiration Date \_\_\_\_\_

Anticipated Signing Date \_\_\_\_\_

### Borrower Information (as they should appear on the docs)

Borrower Name (first, last) \_\_\_\_\_ Co-Borrower Name (first, last) \_\_\_\_\_

Non-Borrowing Spouse (if applicable) \_\_\_\_\_ Co-Borrower on Title Only Yes No

Vesting \_\_\_\_\_

POA (approval required prior to docs) Yes (attach copy of POA) No

### Property Information

Street Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_

### Property Type

SFRC Condo PUD MF Units \_\_\_\_\_

### Loan Purpose

Purchase R/T Refi Cash Out Refi

Owner Occupied Non-Owner 2nd Home

### Compensation Plan

Borrower Paid

Comp Plan% \_\_\_\_\_

### Loan Information

Term - 30 Yrs, 15 Yrs, \_\_\_\_\_ Yrs \_\_\_\_\_ Arm Term

Loan Program \_\_\_\_\_

Appraised Value \$ \_\_\_\_\_

Full Loan Amount \$ \_\_\_\_\_

Sales Price \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ %

First Payment \_\_\_\_\_ Signing Date \_\_\_\_\_

Property Type \_\_\_\_\_

PUD or Condo Name \_\_\_\_\_

Escrow Holdback Yes No Impounds/Escrows Yes No

Taxes & Insurance

Taxes Only

Insurance Only

### Fees: Must match most recently disclosed LE and within APR tolerance. Please obtain most updated Title and Escrow Fees

### Broker Fees

1. Origination Charges POC Amount

Underwriting Fees = \$1,795 \_\_\_\_\_ \$ \_\_\_\_\_

Mortgage Broker Fee \_\_\_\_\_ \$ \_\_\_\_\_

Processing Fee \_\_\_\_\_ \$ \_\_\_\_\_

2. Lender Credits, Discount Fees or Broker Credits Amount

Lender Credit to Borrower \_\_\_\_\_ \$ \_\_\_\_\_

Bonafide Discount Fee \_\_\_\_\_ \$ \_\_\_\_\_

3. Required Services Amount

Tax Service Fee \$80.00 \_\_\_\_\_

Appraisal Fee (invoice required) \_\_\_\_\_

POC Yes No

Bkr Reimbursed Yes No

Credit Report Fee (invoice required) \_\_\_\_\_ \$ \_\_\_\_\_

POC Yes No

Bkr Reimbursed Yes No

Flood Cert Fee (lender) \$14.00 \_\_\_\_\_ \$ \_\_\_\_\_

Lender Fees Locked to Rate Yes No

### Lead + Wholesale Only

Account Executive: \_\_\_\_\_

Account Manager: \_\_\_\_\_

Notes: \_\_\_\_\_

### Broker Contact Information

Company Name \_\_\_\_\_

Loan Officer (first name, last name) \_\_\_\_\_

Email 1 \_\_\_\_\_

Phone 1 \_\_\_\_\_

Processor - (first name, last name) \_\_\_\_\_

Email 2 \_\_\_\_\_

Phone 2 \_\_\_\_\_

### Escrow Company Information

Company Name \_\_\_\_\_ License # \_\_\_\_\_

Escrow Officer \_\_\_\_\_ License # \_\_\_\_\_

Phone \_\_\_\_\_ Email for DOCS \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_

### Title Company Information

Company Name \_\_\_\_\_

Title Officer \_\_\_\_\_ Phone # \_\_\_\_\_

Email \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_

### Other Contact Information - PURCHASE TRANSACTIONS ONLY

#### A. PROPERTY SELLER REALTOR INFORMATION

Real Estate Company Name \_\_\_\_\_ License # \_\_\_\_\_

Agent Name \_\_\_\_\_ Email \_\_\_\_\_

Agent Phone \_\_\_\_\_ Agent License # \_\_\_\_\_

Address \_\_\_\_\_

#### B. BUYER/BORROWER REALTOR INFORMATION

Real Estate Company Name \_\_\_\_\_ License # \_\_\_\_\_

Agent Name \_\_\_\_\_ Email \_\_\_\_\_

Agent Phone \_\_\_\_\_ Agent License # \_\_\_\_\_

Address \_\_\_\_\_

#### C. PROPERTY SELLER INFORMATION

Property Seller Name \_\_\_\_\_ Address \_\_\_\_\_

### Loan Officer Signature Line:

\_\_\_\_\_