SUBMISSION FORM

Account Executive: ____________________

ORIGINATOR INFORMATION

Company Name: ____________________

Loan Officer: ____________________ Phone: ____________ Email: ____________

Loan Processor: ____________________ Phone: ____________ Email: ____________

BORROWER INFORMATION

Borrower: ____________________ Email: ____________________

Co-Borrower: ____________________ Email: ____________________

Loan Product: ☐ EquityWyse ☐ InvestorWyse ☐ AltWyse ☐ CreditWyse+ ☐ CreditWyse ☐ CommercialWyse
☐ PrimeWyse Jumbo ☐ PrimeWyse ☐ ITINWyse ☐ ForeignWyse ☐ AgencyWyse ☐ AgencyWyse HB

Income Type: ☐ Wage Earner ☐ Pers. Bank Stmt 12m ☐ Bus. Bank Stmt 12m ☐ 3rd Party P&L ☐ 3rd Party Tax Pro P&L Only ☐ Fixed Expense Ratio
☐ WVOE ☐ Pers. Bank Stmt 24m ☐ Bus. Bank Stmt 24m ☐ Asset Utilization ☐ 3rd Party Expense Stmt ☐ Form 1099 Income

PROPERTY INFORMATION

Property Address: ____________________

CIty: ____________ State: ______ Zip Code: ____________

Property Type: ☐ SFR ☐ Condo ☐ 2-4 Units ☐ 5+ Units ☐ Mix Use

Purchase Price: ____________ Est. Value: ____________

REQUIRED DOCUMENTS FOR ALL LOAN PROGRAMS

- ☐ Completed/Typed 1003 signed
- ☐ Mortgage Coupon (subject property)
- ☐ Itemized Fee Worksheet (including title fees sheet)
- ☐ HOI (subject property)
- ☐ DU/LPA Findings
- ☐ Assets/Reserves
- ☐ Credit Report for all borrowers dated within 60 days
- ☐ Lease - if applicable
- ☐ Preliminary Title Report OR property profile to submit
- ☐ Submission Form
- ☐ Sales Contract - if applicable
- ☐ FNMA 3.4
- ☐ Credit Report Invoice

SELF-EMPLOYED

- ☐ YTD P&L Statement and Business License (for self-employed borrowers)
- ☐ K-1s: most recent 2 years for all businesses owned on Schedule E of Form 1040
- ☐ Business Federal Tax Returns (1065, 1120S or 1120) with all schedules (for ownership of 25% or more): most recent 2 years
- ☐ Business Narrative Letter and Business License

LOAN INFORMATION

LTV: ________ CLTV: ________

Loan Amount: ____________ Interest Rate: ________

Loan Type: ☐ Fixed ☐ 5/1 ARM ☐ 7/1 ARM

Interest Only? ☐ Yes ☐ No Impounds? ☐ Yes ☐ No

Loan Purpose: ☐ Purchase ☐ C/O ☐ R/T

Occupancy: ☐ O/O ☐ 2nd Home ☐ N/O/O

REQUIRED INCOME DOCUMENTS

- ☐ Form 1040 (Individual Tax Returns) for most recent years, all schedules/statements
- ☐ Bank/Brokerage/Asset Statements: most recent 2 months, all pages

WAGE EARNERS/FIXED INCOME

- ☐ Pay stubs: most recent 30-day pay cycle
- ☐ W-2s: most recent 2 years
- ☐ 1099s for Social Security or pension/retirement income or award letters/benefits statement
- ☐ Bank/Brokerage/Asset Statements: most recent 2 months, all pages

RENTAL INCOME

- ☐ Current lease agreement with proof of 2 months receipt of rent
- ☐ InvestorWyse Rental survey (Form 1007) required

BROKER COMPENSATION

Origination Fee: ☐ Lender Paid ☐ Borrower Paid

% Amount: ________ or Flat Fee: $____________

3rd Party Processing Fee: $ ____________ ☐ Invoice attached

Credit Report: $ ____________ ☐ Pay to Broker

Appraisal Fee: $ ____________ POC ☐ Pay to Broker

LOANWYSE FEES

Non-QM:	$1,795.00
Commercial:	$3,495.00
Jumbo:	$1,495.00
Agency:	$1,195.00
Condo Review:	$300.00
2nd Mortgages:	$995.00