

## LOAN SUBMISSION SHEET

### PARTNER - LOAN OFFICER - PROCESSOR CONTACT INFORMATION:

|               |                     |
|---------------|---------------------|
| Partner Name: | Processing Company: |
| LO Name:      | Processor Name:     |
| LO Email:     | Processor Email:    |
| LO Phone:     | Processor Phone:    |

### BORROWER & CO-BORROWER INFORMATION:

|           |              |
|-----------|--------------|
| Borrower: | Co-Borrower: |
|-----------|--------------|

#### Notes for Intake, Processing & Underwriting:

### SUBJECT PROPERTY INFORMATION:

|                                                |                                                       |
|------------------------------------------------|-------------------------------------------------------|
| SFR, PUD, CONDO, MULTI, MFH (double-wide only) | Estimated Value:                                      |
| Number of Units:                               | Estimated Liens:                                      |
| Solar Panels:                                  | Seasoned:                                             |
| IF CONDO: Project Name:                        | TRUST: If YES, please supply a copy of the full trust |
| HOA/PUD MGMT Contact #:                        | POA: If YES, please supply Dr's letter                |

### LOAN PROGRAM:

|                         |                          |                         |                           |
|-------------------------|--------------------------|-------------------------|---------------------------|
| <u>FXD, CMT, LIBOR:</u> | HECM ARM Margin:         | Purchase or Refinance:  | Case Transfer:            |
|                         | HECM Fixed Rate          |                         |                           |
| <u>Origination Fee:</u> | SecureEquity ARM Margin: | HECM to HECM Refinance: | Current Case #:           |
| <u>YSP:</u>             | SecureEquity Fixed Rate: | Existing Case #:        | Transfer Letter Included: |

### AMC - PAYMENT TYPE:

|                                           |                                                   |
|-------------------------------------------|---------------------------------------------------|
| AMC for HECM (Mutual of Omaha Processed): | AMC for SecureEquity (Mutual of Omaha Processed): |
| Payment Type:                             | Payment Type:                                     |

### ESCROW/TITLE - PREMIER REVERSE CLOSINGS (PRC) - ALLEGIANT - OTHER:

|                                     |                       |
|-------------------------------------|-----------------------|
| PRC, Allegiant, Other:              | Other Title & Escrow: |
| <u>Notes to Title &amp; Escrow:</u> | Other Title Officer:  |
|                                     | Other Title Phone:    |
|                                     | Other Title Email:    |
|                                     | Other Escrow Officer: |
|                                     | Other Escrow Phone:   |
|                                     | Other Escrow Email:   |