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| **AE Name:** |  | **Broker Name:** |  |
| **Borrower(s) Names(s):** |  | **FICO:** |  |
| **Property Type:** |  | **Purchase Price/Value:** | $ |
| **Occupancy:** |  | **Loan Amount:** | $ |
| **Transaction Type:** |  | **LTV/CLTV:** | % |
| **Income Documentation:** |  | **DTI (Expected):** | % |
| **Income Method:** |  | **First Time Home Buyer?** |  |
| **Scenario Desk?** |  | **Exception Request?** |  |
| **If yes, Scenario #:** |  | **Exception Type** **(LTV, FICO, Reserves, etc.)** |  |

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| **Describe the Borrower’s Income, or Any Unique Income Situations (If bank statement, complete business narrative, multiple use accounts, commingled accounts, how are we configuring the expense ratio, etc.):** |
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| **Give an Overview of the Borrower’s Credit (FICO, Credit Events, Housing Events, Tradelines, Forbearance, etc.):** |
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| **Give an Overview of the Borrower’s Assets (where are the reserves, down payment, and closing costs coming from? Is cash out being used for reserves, are we using a 1031 exchange, any uniqueness to the funds, etc.):** |
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| **Describe the Borrower’s Collateral (anything unique to be aware of, appraisal issues, recent upgrades we need to be aware of, how long property has been owned, etc.):** |
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| **Explain any Exceptions requested by the Borrower/Broker (LTV, FICO, Reserves, Seasoning, etc.)** |
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| **Additional Notes (if any):** |
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| **Has a preliminary bank statement review been completed?** |
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