

1st MTG. DOC REQUEST FORM

Fax To: (949) 863-3303

Broker: _____

Contact: _____

Phone: _____

Fax: _____

Email Docs To: _____

Signing Date: _____

Loan Information

Program: _____

Transaction Type: REFI Purch.
(Circle one)

Loan Amt.: _____ **Int. Rate:** _____ **Term:** _____ yrs

Fixed or Adjustable **Type of Adjustable:** 3yr 5yr 7yr 10yr
(Circle One) (Circle One)

Index: **1yr LIB (Conventional)** **1yr TREAS (FHA)** **Margin:** _____
(Circle One)

Rebate / Cost: _____
(Circle One)

Crestline Fees: Underwriting: \$625; Doc Prep \$200;
Warehouse: \$100; Appraisal Review: \$75

Escrow Company: _____

Title Company: _____

Escrow #: _____

Title #: _____

APN: _____

Date of Title: _____

Borrower Information

Borrower Phone #: _____

Borrower: _____ **SS#:** _____

Co-Borrower: _____ **SS#:** _____

Vesting: _____

****Borrower Names and Vesting must be as they appear on Title****

Property Information

Appraised Value: _____

Owner Occ. **Investment** **2nd Home** **SFR** **Condo** **PUD** **Units**____
(Circle One) (Circle One)

Property Address: _____

City: _____ **State:** _____ **Zip:** _____

County: _____

Condo/ PUD HOA Name: _____

Impound Information

Impounds? **Yes** **No**
(Fill out (*) information below.)

***6-mo. Prop. Taxes (from Title):** _____

PMI? **Yes** **No**

***Yearly Hazard Ins. Premium:** _____

***Premium Due Date:** _____

1st MTG. DOC REQUEST ADDENDUM

(THIS ADDENDUM MUST BE INCLUDED WITH ALL DOC REQUESTS,
AND ALL FEES MUST BE LISTED –
 PLEASE ALSO INCLUDE ESTIMATED HUD FOR TITLE/ESCROW FEES)

| <u>DESCRIPTION</u> | <u>AMOUNT</u> | <u>VENDOR</u> | <u>POC ITEM?</u> |
|--------------------|---------------|-----------------------|------------------|
| Broker Origination | \$_____ | To: _____ | Y/N by: |
| Rebate | \$_____ | To: _____ | Y/N by: |
| Discount (Cost) | \$_____ | To: Crestline Funding | Y/N by: |
| Underwriting | \$625 | To: Crestline Funding | Y/N by: |
| Doc Prep | \$200 | To: Crestline Funding | Y/N by: |
| Warehouse | \$100 | To: Crestline Funding | Y/N by: |
| Appraisal Review | \$75 | To: Crestline Funding | Y/N by: |
| Appraisal | \$_____ | To: _____ | Y/N by: |
| Broker Processing | \$_____ | To: _____ | Y/N by: |
| _____ | \$_____ | To: _____ | Y/N by: |
| _____ | \$_____ | To: _____ | Y/N by: |
| _____ | \$_____ | To: _____ | Y/N by: |
| _____ | \$_____ | To: _____ | Y/N by: |
| _____ | \$_____ | To: _____ | Y/N by: |
| _____ | \$_____ | To: _____ | Y/N by: |

Total Fees Due Broker: _____

Authorized By: _____
 (Name and Title)