



# LOAN SUBMISSION COVER SHEET

       RSM TO DISCLOSE LE

LQB LOAN NUMBER: \_\_\_\_\_ REQUEST DATE: \_\_\_\_\_

LO NAME: \_\_\_\_\_ EMAIL ADDRESS: \_\_\_\_\_

BORROWER NAME: \_\_\_\_\_ EST. CLOSING DATE: \_\_\_\_\_

BORROWER EMAIL ADDRESS: \_\_\_\_\_

IS THE LO RELATED TO THE BORROWER?        YES        /        NO

FULL PROPERTY ADDRESS: \_\_\_\_\_

\_\_\_\_\_

PROPERTY TYPE:        SFR        CONDO        UNITS AMC: \_\_\_\_\_

LOAN PURPOSE:        PURCHASE        RT REFI        CASH OUT REFI IMPOUNDS:        Y /        N

       DU REFI PLUS        STREAMLINE        OTHER \_\_\_\_\_

OCCUPANCY:        O/O        2<sup>ND</sup> HOME        NOO

Rebate/Discount: \_\_\_\_\_ % Lock Expire Date: \_\_\_\_\_

Borrower Paid?        Y /        N (if YES, rebate must be credited to borrower's closing costs)

Lender Paid?        Y /        N (if YES, rebate must be used toward LO Fees, overage must be credited to borrower)

COMP PLAN: \_\_\_\_\_

LOAN AMOUNT: \_\_\_\_\_ LTV: \_\_\_\_\_

       FHA        CONV        VA        USDA        OTHER: \_\_\_\_\_

WHO WILL CLOSE THIS LOAN?        THIRD PARTY        BROKER-OWNED ESCROW

## MESSAGE TO UNDERWRITER—

BRIEF DESCRIPTION OF LOAN/ANY UNUSUAL CHARACTERISTICS OR GUIDELINE APPLICATIONS



## Minimum Submission List

### RSM TO ISSUE LE AND INITIAL DISCLOSURES

MINIMUM SUBMISSION REQUIREMENTS FOR RSM TO ISSUE LE AND INITIAL DISCLOSURES
<ul style="list-style-type: none"> <li>• 1003 - Signed and dated by LO</li> <li>• Email address for all borrowers</li> <li>• Fee Sheet from Escrow/Closing Agent reflecting all applicable fees – transfer tax required for purchase transactions in applicable states</li> <li>• AUS approval – Finalized and Released to RSM</li> <li>• Credit Report</li> <li>• Borrowers Authorization to pull credit dated on or before credit report</li> </ul>

ADDITIONAL DOCUMENTS REQUIRED TO SUBMIT LOAN INTO UNDERWRITING	
<ul style="list-style-type: none"> <li>• Income documents required by AUS</li> <li>• Asset documents required by AUS</li> </ul>	<ul style="list-style-type: none"> <li>• Preliminary Title, if applicable</li> <li>• Purchase contract, if applicable</li> </ul>
Additional Documents for FHA loans	Additional Documents for VA loans
<ul style="list-style-type: none"> <li>• FHA Case Assignment</li> <li>• 92900A – signed and dated by all parties</li> <li>• Note for existing loan or mortgage statement (if streamline)</li> <li>• Current payoff (if streamline)</li> <li>• 2 Utility Bills (if streamline)</li> <li>• Non-borrowing spouse credit report and authorization to pull credit</li> </ul>	<ul style="list-style-type: none"> <li>• VA Case Number Assignment assigned to RSM</li> <li>• Initial signed 1802-A</li> <li>• Non-borrowing spouse credit report and authorization to pull credit</li> </ul>