

LOAN #: \_\_\_\_\_ BORR LAST NAME #: \_\_\_\_\_ AE: \_\_\_\_\_ AM: \_\_\_\_\_

**BROKER INFORMATION**  
Company Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Loan Officer: _____ Email: _____ Phone: _____	Loan Processor: _____ Email: _____ Phone: _____
--	--

**SUBJECT PROPERTY**  
Address: \_\_\_\_\_, City: \_\_\_\_\_, State: \_\_\_\_\_, Zip: \_\_\_\_\_

<b>BORROWER</b> FICO: _____ First Name: _____ Last Name: _____ Email: _____	<b>CO-BORROWER</b> FICO: _____ First Name: _____ Last Name: _____ Email: _____
--	---

<b>ESCROW CONTACT</b> Escrow Officer: _____ Email Docs to: _____ Phone: _____	<b>LOAN INFORMATION</b> Loan Amount: _____ Rate: _____ Term: _____
--	--

<b>PROGRAM</b> <input type="radio"/>	<b>TRANSACTION</b> <input type="radio"/> Purchase <input type="radio"/> R/T Refinance <input type="radio"/> Cashout	<b>OCCUPANCY</b> <input type="radio"/> Primary <input type="radio"/> 2 <sup>nd</sup> Home <input type="radio"/> Investment	<b>PROPERTY TYPE</b> <input type="radio"/> SFR <input type="radio"/> PUD <input type="radio"/> Condo <input type="radio"/> Manufactured <input type="radio"/> 2-4 Unit	<b>BROKER COMPENSATION</b> <input type="radio"/> Borrower Paid Broker's %: \$ _____ <b>OR</b> Flat Fee: \$ _____ <input type="radio"/> Lender Paid Comp Plan: _____ % + Flat Fee \$ _____
<b>DOC TYPE</b> <input type="radio"/>	<b>IMPOUNDS</b> <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Waiver			

<b>FEE'S</b>			<input type="radio"/> <b>Independent Processing Fee (if applicable)</b> \$ _____ NMLS# _____  <b>POA</b> <input type="radio"/> Yes <input type="radio"/> No  <b>*INVESTMENT PROPERTIES ONLY*</b> <input type="radio"/> No PPP <input type="radio"/> 1yr PPP <input type="radio"/> 2yr PPP <input type="radio"/> 3yr PPP  <b>VESTING</b> Trust LLC Individual <hr/> <b>LENDER'S FEE</b> <input type="radio"/> AGENCY/NON-QM - \$1,195 <input type="radio"/> STREAMLINE/IRRRL - \$595
<b>BORROWER PAID</b> <b>HELOC (STATED)</b> Origination: _____ % <b>OR Flat Fee:</b> _____ Rebate: _____ % <b>LENDER PAID</b> Broker's Comp: _____ + <b>Flat Fee:</b> _____ Rebate: _____ Lender's Discount: _____ Credit Report: _____ POC <b>Reimburse?</b> Yes No Appraisal: _____ POC <b>Reimburse?</b> Yes No 1004D: _____ POC <b>Reimburse?</b> Yes No VOE: _____ POC <b>Reimburse?</b> Yes No HOA Cert: _____ POC <b>Reimburse?</b> Yes No 3 <sup>rd</sup> Party Processing: _____ (Invoice Required)			
<b>BROKER CHECK TOTAL</b> _____			

<b>REQUIRED DOCS:</b> <input type="radio"/> Vesting Amendment <input type="radio"/> Settlement Statement <input type="radio"/> Closing Date (TX ONLY)	<input type="radio"/> Insurance <input type="radio"/> Locked Rate	<b>LOSS PAYEE:</b> Castle Mortgage Corporation d.b.a. Excelebrate Capital Its Successors and/or Assigns 4000 MacArthur Blvd, Suite 300 Newport Beach, CA 92660
--	--	--

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_