

We Want To Talk To You!

PLEASE TELL US WHO AND WHERE?

WITHOUT THIS, IT'S REALLY HARD TO SHOW HOW MUCH WE CARE!

LOAN OFFICER NAME: _____	COMPANY: _____	LOAN OFFICER LIC#: _____
BRK PRIMARY CONTACT: _____	PHONE: _____	EMAIL: _____
BRKR SECONDARY CONTACT: _____	PHONE: _____	EMAIL: _____
CPF LOAN #: _____	PRODUCT CODE: _____	PROGRAM: _____
<input type="checkbox"/> FIXED <input type="checkbox"/> ARM (PRODUCT TYPE MUST MATCH JUMBO ELIGIBILITY REQUEST FORM)		
LTV: _____%	CLTV: _____%	RATE: _____
BORROWER NAME: _____		LOCKED DATE (if applicable): _____
BORROWER EMAIL: _____		
CO-BORROWER NAME: _____		CO-BORROWER EMAIL: _____
CO-BORROWER EMAIL: _____		
FICO SCORES:	BORROWER: _____	CO-BORROWER: _____
<input type="checkbox"/> PRIMARY RESIDENCE	<input type="checkbox"/> SFR	<input type="checkbox"/> PURCHASE
<input type="checkbox"/> SECOND HOME	<input type="checkbox"/> DETACHED CONDO/PUD	<input type="checkbox"/> RATE/TERM
	<input type="checkbox"/> 2-4 UNITS	<input type="checkbox"/> CASH-OUT REFI

Required for loan to be DISCLOSED by ClearPoint Funding, Inc

- This submission form fully completed
- ClearPoint funding requires loan to be registered or locked prior to submission for disclosures
- Jumbo Eligibility Request form completed and signed by CPF
- 1008 Transmittal Summary
- Initial Signed and Dated 1003 (with all HMDA/GMI data complete)
 - (If application was taken *FACE TO FACE* the 1003 must be signed by the *BORROWER*)
 - (If application was taken by *PHONE, INTERNET or MAIL* the 1003 must be signed by the *LOAN OFFICER*)
- GFE with accurate Fees dated within 3 days of application
- Settlement Provider List
- Broker Compensation Disclosure and Initial Fees Worksheet showing breakdown of fees
- Tri-merge credit report No older than 60 days

All of the above and BOLD items below are required for submission to UNDERWRITING

- Completed and signed 4506T by all borrowers** (separate form if Joint on Return and must be same address as shown on return)
- Borrowers Authorization**
- Income documentation** (Most Recent paystub covering 30 day period, 2 years W2's, 2 years federal tax returns for SE. See CPF guidelines for complete income requirements)
- Final Typed 1003/1008**
- Verification of assets** (Most recent 3 months bank statements, large deposits must be sourced, See CPF Guidelines for Reserve requirements)
- Verification of Mortgage if not shown on credit report** (most recent 12 months)
 - LOX for all adverse credit and credit inquiries
 - Evidence of social security number, if not on paystub or W-2
 - Social Security Consent Form (Must be CPF Form, when required)
 - Current Note and/or mortgage statement (confirming net tangible benefit)
 - Copy of current note (Refinance only)
 - Payoff statement (Refinance only)
 - Appraisal Report (Uploaded in COLOR)
 - Appraiser License
 - ClearPoint Funding Condo / PUD Questionnaire (If applicable)
 - Divorce decree (If Applicable)
- Executed Purchase agreement and addendums (Purchase only)**
 - Earnest Money Verification/Copy of cancelled checks (front and back, sourced)
 - All other applicable and state specific Broker Disclosures (signed by all borrowers)
 - Subordination agreement (if applicable)
 - Closing Fee Sheet
 - Title Commitment - (Must show 24 month chain)
 - CPL, Wire, E&O, Attorney fee sheet/Prelim HUD
 - Insurance binder (showing premium, PIF or amount due and CPF loss payee as shown on top of this form)/Condo Master Policy and HO6
 - Other: _____
- Reminder:** You must select "Final" under the "Actions tab" in Avista to submit for initial disclosure AND any resubmission for corrections on disclosure and/or underwriting.

NOTE: This checklist is to assist you in submission only, additional documentation may apply. Please visit us at www.clearpointfunding.com for complete products and guideline information.

Assignment and True Certification

I hereby assign and/or transfer the above loan to ClearPoint Funding and certify that all documents are true and correct to the best of my knowledge.

Signature: _____ Printed Name: _____ Date: _____