



Broker Information

Broker: _____	Broker ID: _____	Date: _____
Loan Officer: _____	Loan Number: _____	Account Executive: _____
Email: _____	Phone: _____	Fax: _____

Borrower Information

Borrower Name: _____	SSN: _____	Fico: _____
Co-Borrower Name: _____	SSN: _____	Fico: _____
Street Address: _____	County: _____	
City: _____	State: _____	Zip Code: _____

Loan Information

Occupancy	Primary	2nd Home	Investment
Property Type	LR Condo	HR Condo	Condotel
SFD/PUD	2 Unit	3 Unit	4 Unit
Purpose	Purchase	R/T Refinance	C/O Refinance
	Streamline Refinance	Equityline	C/O Equityline
Doc Type	Full/Alt	Stated / VA	SISA
	EZ Doc	No Ratio	No Doc

Lock Information

Rate Sheet ID: _____
Rate: _____
Lock Period: _____
Expiration Date: _____
At lock extension: _____ Days _____ Cost _____

Pricing Adjustments

	Rate	Margin	Rebate
Rate sheet			
Loan Amount			
Cash Out			
2 nd Home			
Non-Owner			
2-4 Units			
Condo			
Fico			
No Impounds			
Ratios			
Interest Only			
Program			
Ltv/Cltv			
Doc Type			
State			
Other			
Net (after adjustments)			

All applicable adjustments must be filled in above.

Loan Amount	_____
Purchase Price	_____
Appraised Value	_____
Subordinate Loan Amount	_____
Ltv/Cltv	_____
Ratios	_____
Self Employed	_____
Product Code	_____
Product Description	_____
Margin	_____
Arm Type	1yr T-Bill 6m / 1yr Libor 1m / 3m MTA
Prepayment	Yes / No 1yr Hard 3yr Soft 3yr Hard
Underwriting Method	DU LP Manual

**** If there is any information missing and the market is moving, we will NOT be able to accept this lock request ****

Responsibilities for Early Payoff

In the event that a mortgage loan is prepaid in full, the following criteria will be applied to determine early payoff charges – Borrower must have made at least six (6) scheduled payments on his/her loan prior to pay-off.
In the event of an early pay-off not meeting the above criteria – Broker shall refund to Summit any amounts paid to Bank Partner in excess of par for the Mortgage Loan

Broker Authorization Section

Lock Requested and Terms acknowledged by:

Date: