Loan Setup and Disclosure Form - Broker

Loan Registration Requirements	
☐	Loan Setup and Disclosure Form
☐	Anti-Steering Disclosure
☐	Fee Sheet - Including Hazard Insurance and Property Tax Estimates
☐	Credit Report, Copy Uploaded to File and Reissued through the TPO Portal
☐	AUS Findings, Run through the TPO Portal
☐	Purchase Agreement, If Applicable

General Loan Information	
Account Executive	
Loan Number	
Application Date	
MLS Underwriting Fee	(Please Select)
Taxes and Insurance	(Please Select)
Compensation Method	(Please Select)
Comp % (Borrower-Paid)	
Credit Authorization Method	(Please Select)
Credit Authorization Date	
Borrower Email	
Co-Borrower Email	

Broker Information	
Broker Name	
Loan Point(s)-of-Contact	
Contact Phone Number(s)	
Contact Email(s)	

Loan Summary, File Specific Information and/or Additional Notes

EQUAL HOUSING LENDER

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