



# ALL-IN-ONE FORM

Loan Submission/Checklist/Broker Agreement    Lock-In Request    Doc Order Form

New Loan Submission: [newloan@tjfinancial.com](mailto:newloan@tjfinancial.com)  
 Lock-In Request: [lockin@tjfinancial.com](mailto:lockin@tjfinancial.com)  
 Underwriting Condition: [condition@tjfinancial.com](mailto:condition@tjfinancial.com)

181 W. Huntington Dr. #108  
 Monrovia, CA 91016   T-Box: R-305C  
 Phone: (626) 599-9700 Fax:(626) 599-9704

Date: \_\_\_\_\_ TJ A/E: \_\_\_\_\_  
 Broker Co.: \_\_\_\_\_ Contact: \_\_\_\_\_  
 Co. Address: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
 \_\_\_\_\_ Email: \_\_\_\_\_  
 Borrower1: \_\_\_\_\_ Borrower2: \_\_\_\_\_

Property Addr. \_\_\_\_\_ County: \_\_\_\_\_

Sales Price (\$): \_\_\_\_\_ Appraisal(\$): \_\_\_\_\_ Loan Amount(\$): \_\_\_\_\_

Program: \_\_\_\_\_ Interest Rate: \_\_\_\_\_ LTV(%): \_\_\_\_\_ CLTV(%): \_\_\_\_\_ D\_FICO: \_\_\_\_\_ DTI: \_\_\_\_\_

**Property Type**

- SFR    CONDO    2U  
 PUD    HR-CONDO    3U  
 4U

**Document Type**

- Full/Alt Doc  
 VOE

**Purpose Of Loan**

- Purchase  
 RT Refinance  
 Cash-Out Refinance

**Occupancy**

- Primary Residence  
 2nd Home  
 Investment

\*\*Refer to our appraisal order form for fee\*\*

Block #1 in GFE					Block #2 in GFE		Block #3 in GFE	
T.J. Fee	Broker Origination Fee	Broker Processing Fee	Broker Application Fee	<b>Total Fee</b> (This fee must be = or < than GFE Block #1)	T.J. Final Pricing In \$ Amt. <b>(Check Credit in "2<sup>nd</sup> Box" or Charge in "3<sup>rd</sup> Box"</b>	Broker Credit Report Fee	T. J. Appraisal Fee	
\$ *920	+ \$ _____	+ \$ _____	+ \$ _____	= _____	\$ _____ Charge or (Credit)	\$ _____	\$ _____	
Impound Request: _____ Tax _____ Ins. _____ None Email Loan Doc to: _____ Borrower's Email: _____ *Please include T.J. Fee \$920 in GFE #1 (U/W Fee \$650/Doc. Fee \$270)					1. Broker to notify T.J. of any "Changed Circumstances". IMMEDIATELY, if any to <a href="mailto:condition@tjfinancial.com">condition@tjfinancial.com</a> 2. For Advance Lock, all items on checklist are required.			

**Loan Submission Checklist: (ALL items on checklist are minimum requirement prior to registration. Complete package is recommended)**

- 1. T.J. Financial, Inc. All-In-One Form (Signed By Loan Broker and Loan Officer)
- 2. Completed Initial Loan Application Form (Signed/Dated)
- 3. Borrower's Authorization Form (Signed)
- 4. Completed Initial GFE dated within 3 days of Loan Application Form and Settlement Service Provider List
- 5. Mortgage Broker Fee Agreement (NEW Form required on & after 2/15/10; Signed/Dated by borrower & broker)
- 6. Borrower's Intent to Proceed (T.J. Form; Signed/Dated by borrower) **-Only required if old MBFA is used.**
- 7. Fair Lending Notice And Initial Truth-In-Lending prepared within 3 days of initial Loan Application Form
- 8. 4506-T Form (Signed/Dated on Application Date)

**BY SIGNING BELOW, WE CERTIFY THAT WE UNDERSTAND AND AGREE TO THE FOLLOWING:**

Any violation of the tolerance for charges listed on the GFE will be reimbursed to the borrower at the broker's expense and the cure amount will be deducted from the broker's check within 30 days of closing. In addition, if a changed circumstance occurs, broker will notify T.J. Financial IMMEDIATELY with a fully executed "Changed Circumstance Request Form" so that a re-disclosure can be sent to the borrower within 3 business days. If the broker does not notify T.J. Financial in a timely manner, the ability to re-disclose and change a fee is lost and the broker will be held responsible for the difference in the fees affected by the changed circumstance. We hereby authorize my broker check to be deducted by the violation amount in the event of any RESPA violation described above.

Broker/Owner Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Loan Officer/Loan Agent Signature \_\_\_\_\_ Date \_\_\_\_\_

To Lock-In Rate, Complete The Box Below And Fax To (626) 599-9704 Or Email To Cherry Chen: [Lockin@Tjfinancial.Com](mailto:Lockin@Tjfinancial.Com)  
 To Order Loan Document, Please fax this form to (626) 599-1789 Or Email To Nadia Duarte: [Loandoc@Tjfinancial.Com](mailto:Loandoc@Tjfinancial.Com)  
 Or Celia Ochoa: [Celiaochoa@Tjfinancial.Com](mailto:Celiaochoa@Tjfinancial.Com)

Complete Only When Lock-In	
Loan #: _____	<input type="checkbox"/> Advanced Lock
Program Code: _____	
Interest Rate(%): _____	
Length of Lock: _____	
Points(Rebate): _____	
Locked By: _____	

Confirmation from T. J. Financial, Inc.	
Lock Received: _____	
Lock Expired: _____	
File Must Be In: _____	
Index: _____	
Margin: _____	
Authorized By: _____	