



ALL-IN-ONE FORM

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

New Loan Submission: newloan@tjfinancial.com
 Pricing Questions: lockin@tjfinancial.com
 Underwriting Condition: condition@tjfinancial.com

101 E. Huntington Dr. #102
 Monrovia, CA 91016
 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 High-Rise 3U
 Detached 4U

Document Type

- Full/Alt Doc

of Financed Properties: _____

Purpose Of Loan

- Purchase
 RT Refinance
 Cash-Out Refinance

Occupancy

- Primary Residence
 2nd Home
 Investment

PIW Request:

Refer to our appraisal order form for appraisal fees

Lender's Fee \$ 995 Compensation Method (Must check one) <input type="checkbox"/> Lender Paid <input type="checkbox"/> Borrower Paid LO Compensation \$ _____	T.J. Final Pricing In \$ Amt. (Shown in Loan Costs or Lender Credits) \$ _____ Charge or (Credit)	Broker Credit Report Fee (Please check one) \$ _____ <input type="checkbox"/> Prepaid by borrower (P.O.C.) <input type="checkbox"/> Charge borrower	T. J. Appraisal Fee (Please check one) \$ _____ <input type="checkbox"/> Prepaid by borrower (P.O.C.) <input type="checkbox"/> Charge borrower
		Impound Request: _____ Tax _____ Ins. _____ None Email Loan Doc to: _____ Borrower's Email: _____ *Please include Lender's fee \$995 in Loan Costs on <u>Loan Estimate</u>	

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/Dated by Loan Broker & Loan Officer)
- 2. Fully Completed Initial Loan Application Form 1003 with DIA Form (Signed/Dated by Borrower & Interviewer)
- 3. Borrower's Authorization Form (Signed/Dated by Borrower and prepared within 3 days of 1003 Application Date)
- 4. Completed Initial Loan Estimate dated within 3 days of Loan Application Form and Settlement Service Provider List (SSPL)
- 5. Mortgage Broker Fee Agreement and Anti-Steering/ Safe Harbor Disclosure (T.J. Form; Signed/Dated prior to submission by borrower & broker)
- 6. Fair Lending Notice prepared within 3 days of Initial Loan Application Form 1003
- 7. Form 4506-T (Rev. 7-2017) (Signed/Dated by Borrower and prepared within 3 days of 1003 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 Loan Estimate 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 lock-in request online & email any questions to: lockin@tjfinancial.com

To Order Loan Documents, please email doc request with Closing Disclosure provided by escrow to: loandoc@tjfinancial.com

Complete Only When Lock-In

Borrower Paid Lender Paid
 Loan #: _____ Advanced Lock
 Program Code: _____
 Interest Rate(%): _____
 Length of Lock: _____
 Points(Rebate): _____
 Locked By: _____

Lock-In Confirmation from T. J. Financial, Inc.

Lock Received: _____
 Lock Expired: _____
 File Must Be In: _____
 Index: _____
 Margin: _____
 Authorized By: _____