

AE Name:

Website: <https://www.wholesale.springeq.com/>

Portal: <https://www.wholesale.springeq.com/client-login/>

Submit by uploading 3.4 to our portal or by emailing the files to: springforward@springeq.com

Date:

Purpose: Purchase–Piggyback Refinance–Piggyback Stand-alone 2nd
1st Lien HELOC

Primary Borrower's Name:

Email:

Co-Borrower's Name:

Email:

COMPANY INFO

Mortgage Company Name:

MLO Name:

Phone:

Email:

Processor/Team Name:

Phone:

Email:

LOAN REQUEST INFO

Proposed HCLTV %

Proposed Rate

Current/Proposed 1st Mortgage Balance: \$

Property Value/Purchase Price: \$

Property Type: 1-U/PUD 2-4 Unit Condo 2nd Home Non-Owner Occupied

LOCK TERM: 45-day 60-day

HELOC Adjustable Line

Select One:

3yr-Draw

10yr-Draw

HELOC Line Amount: \$

Initial Draw Amount: \$

—OR—

HELOAN Fixed

Fixed Loan Amount: \$

Term (11m I/O, 10, 15, 20, 25, 30 Yr):



IMPORTANT DATES & INFO

Estimated Closing Date:

Supplying an already completed Appraisal (within 12 months)? Yes No

TITLE/ESCROW COMPANY INFO (PIGGYBACKS ONLY)

Reference /Escrow #:

Company Name:

Company Phone Number:

Contact Name:

Contact Email:

BROKER COMPENSATION INFO

Lender Paid Compensation (Available on Fixed Loans Only)?: Yes No

— OR —

Borrower Paid Compensation?: Yes No % of Loan/HELOC Draw: OR \$\$ Amount:

COMPLETE THE FOLLOWING QUESTIONS

- Yes No Is any portion of the loan being used to purchase another property?
- Yes No Will any portion of the proceeds of this loan be used for home improvement purposes?
- Yes No Is any portion of this loan being used to payoff an existing mortgage?
- Yes No Will you be using the proceeds for something other than the 3 purposes listed above (purchase, refi, home improvement)?
- Yes No Is the 1st mortgage on the subject property an Interest Only loan?
- Yes No Is the first mortgage on the subject property an FHA, VA, or USDA loan?
- Yes No Is the first mortgage on the subject property a loan you assumed or are in the process of assuming?
- Yes No Will the Total Financing of all property liens be greater than \$2,000,000.00?
- Yes No Will the Total Financing of all property liens be greater than \$3,000,000.00?
- Yes No Have you had a late mortgage payment on ANY MORTGAGE LOAN in the last 24 months?
- Yes No Is the subject property in a Flood Zone that requires Flood Insurance?
- Yes No Have you been rejected from joining a Credit Union previously?



ITEMS NEEDED FOR LOAN REGISTRATION

- FNMA 3.4 MISMO Data File
- 1003 Application in PDF format
- This Submission Form
- Piggyback Loans (All): Loan estimate for new first mortgage
- Piggyback Loans (HELOC only) AUS findings
- Stand-alone 2nds only: First mortgage statement or final CD/closing disclosure (if recently closed)

Please submit to springforward@springeq.com

