



Wholesale Lending Division

REVERSE MORTGAGE LOAN APPLICATION REQUEST

FOR BORROWER PRE-QUALIFICATION USE DATA FORM

LOAN PURPOSE	LOAN PRODUCT	COUNSELING	NON-BORROWING SPOUSE
Refinance	CMT Monthly	Completed	No
Purchase	CMT Annual	Scheduled	Eligible NBS <i>(not available in Texas)</i>
HECM to HECM	Fixed	Not Scheduled	Non-Eligible NBS
	Proprietary		

Date of Application _____

BORROWER INFORMATION

First Name _____

Middle Name _____

Last Name _____

Date of Birth _____

SSN _____

Monthly Income _____

Phone _____

Email _____

Marital Status _____

Race _____

Ethnicity _____

Perm Resident Alien | Requires a POA | Incapacitation Type
 No Yes | No Yes | Cognitive Physical

CO-BORROWER INFORMATION

First Name _____

Middle Name _____

Last Name _____

Date of Birth _____

SSN _____

Monthly Income _____

Phone _____

Email _____

Marital Status _____

Race _____

Ethnicity _____

Perm Resident Alien | Requires a POA | Incapacitation Type
 No Yes | No Yes | Cognitive Physical

MAILING ADDRESS AT TIME OF LOAN APPLICATION

Years at Residence _____

Square Footage _____

PROPERTY TYPE

- Single Family
- Townhouse
- FHA Approved Condo
- HUD Code MFH
- Modular
- 2-4 Unit

ADDRESS OF PROPERTY TO BE FINANCED

CHECK ALL THAT APPLY

- HOA
- In Flood Zone
- Log Construction
- Water Well
- Septic System
- Cistern
- Solar Power
- Occupied Mobile Home on Property
- Non-Occupied Mobile Home on Property
- Egress by Private Road
- More than 5 acres

PROPERTY VALUE

Est. Value or Purchase Price _____ Est. Value or Purchase Price
 Existing Construction built within the last year
 Borrower Purchased the Home within the Past Year

LIENS AND PAYOFFS -- ESTIMATE OF BALANCE DUE ON ANY OF THE FOLLOWING

First Mortgage _____ IRS Tax Lien _____
 Second Mortgage or HELOC _____ Delinquent or Deferred Property Taxes _____

REFINANCE TRANSACTIONS

All Borrowers Are on Title	Yes	No	There are people on Title that will not be Borrowers	Yes	No
Property is vested in a Trust	Yes	No	Borrowers own a 2nd Home or Rentals Properties	Yes	No
At least one Borrower on Title for 12 Months	Yes	No	Deceased person is on Title	Yes	No
At least one Borrower named on all Liens to be Paid	Yes	No			

PURCHASE TRANSACTIONS

Borrower's Current or Former Primary Residence is:
 Listed Under Contract Sold To be Retained Sold more than a year ago
 Proceeds from Sale of Current Home Used as Down Payment Borrowers Own a 2nd Home or Rental Properties
 Yes No Yes No

BORROWERS RECEIVE INCOME FROM WHICH OF THE FOLLOWING SOURCES

Property Taxes _____	Social Security Self-Employments _____	Pension Rental Income _____	W-2 _____	401(k)/IRA Draws Dividend Income _____	Annuity Other _____	HOA _____	Other _____
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Property meets RI Requirements Yes No Explanation if Needed _____
 Reverse Vision Fees Correct Yes No Are there 3 products selected? Yes No

LOAN OFFICER INFORMATION AND APPLICATION DELIVERY

RMLO Who Will Sign Application _____ NMLS Number _____
 Phone Number _____ Email Address _____
 How application was taken Face to Face By Mail Docusign
 Email for Borrower(s) if being sent DocuSign _____ To the Attention of _____ Recipients Phone # _____

Email the loan package to Loan Officer - "I understand the package exceeds 150 pages"

NOTES