



## Broker Loan Submission Form

**Those fields marked by an \* are mandatory fields, and must be completed prior to submission.**

Please note that the persons listed below will be used as primary contacts during the loan process.

BRANCH INFORMATION		
LOAN OFFICER*	PHONE*	EMAIL*
PROCESSOR*	PHONE*	EMAIL*
ADDITIONAL CONTACT	PHONE	EMAIL
BORROWER INFORMATION		
BORROWER NAME	CO-BORROWER NAME	
LOAN INFORMATION		
<b>Transaction Type</b> <input type="checkbox"/> Purchase <input type="checkbox"/> Refinance <input type="checkbox"/> Cash Out <input type="checkbox"/> Rate/Term	<b>Product Type</b> <input type="checkbox"/> Investor Cash Flow <input type="checkbox"/> Personal Bank Statement <input type="checkbox"/> Platinum Jumbo <input type="checkbox"/> Business Bank Statement <input type="checkbox"/> Qualified Mortgage (Correspondent only)	<b>Occupancy</b> <input type="checkbox"/> Owner-Occupied <input type="checkbox"/> Second Home <input type="checkbox"/> Investment – NOO
LOAN SUBMISSION DOCUMENTS		
<b>DOCS IN BOLD RED BELOW MUST BE PRESENT IN ORDER FOR THE LOAN TO BE SUBMITTED TO UNDERWRITING</b>		
<b>Items Required on ALL Loans:</b> <input type="checkbox"/> <b>1003 issued by Angel Oak Signed by LO</b> <input type="checkbox"/> <b>Executed Disclosures (if eSigned through AOMS we will upload for you)</b> <input type="checkbox"/> <b>Anti-Steering Disclosure (if on lender paid option and if eSigned through AOMS we will upload for you)</b> <input type="checkbox"/> <b>Credit Report</b> <input type="checkbox"/> <b>Identification (SSN &amp; Photo ID)</b> <input type="checkbox"/> <b>Sales Contract (for purchase)</b> <input type="checkbox"/> Wet Signed Application Documents (if applicable by state) <input type="checkbox"/> Earnest Money Deposit (if applicable) <input type="checkbox"/> Appraisal <input type="checkbox"/> Title, CPL, E&O, Taxes & Prelim CD <input type="checkbox"/> Assets <input type="checkbox"/> SSI, Pension Award letter (if applicable) <input type="checkbox"/> Closing Confirmation form and Invoices <input type="checkbox"/> Homeowners Insurance or Master HOI & HO6 if Condo <input type="checkbox"/> Condo Questionnaire (if applicable) <input type="checkbox"/> LOX (if applicable)	<b>Platinum Jumbo:</b> <input type="checkbox"/> <b>Paystubs (Most recent 30 days)</b> <input type="checkbox"/> <b>Tax Returns (Most recent 2 years)</b> <input type="checkbox"/> <b>W-2s/ 1099s (Most recent 2 years)</b>  <b>Bank Statement:</b> <input type="checkbox"/> Business or Personal: Business percentage ownership letter from a 3rd party CPA/Tax preparer  <b>Investor Cash Flow:</b> <input type="checkbox"/> Borrower Certification of Investment Purpose Disclosure	
BROKER COMMENTS/NOTES TO UNDERWRITING		

