



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		
Transaction Type <input type="checkbox"/> Purchase <input type="checkbox"/> Refinance <input type="checkbox"/> Cash Out <input type="checkbox"/> Rate/Term	Product Type <input type="checkbox"/> Investor Cash Flow <input type="checkbox"/> Personal Bank Statement <input type="checkbox"/> Full Documentation <input type="checkbox"/> Business Bank Statement <input type="checkbox"/> Qualified Mortgage (Correspondent only)	Occupancy <input type="checkbox"/> Owner-Occupied <input type="checkbox"/> Second Home <input type="checkbox"/> Investment – NOO
LOAN SUBMISSION DOCUMENTS		
DOCS IN BOLD RED BELOW MUST BE PRESENT UNDER REQUIRED AND THE LOAN PROGRAM IN ORDER FOR THE LOAN TO BE SUBMITTED TO UNDERWRITING		
Items Required on ALL Loans: <input type="checkbox"/> 12 month Residential Pay History (Cancelled checks. Mortgage on credit acceptable) <input type="checkbox"/> 1003 issued by Angel Oak Signed by LO <input type="checkbox"/> Executed Disclosures (if eSigned through AOMS we will upload for you) <input type="checkbox"/> Anti-Steering Disclosure (if on lender paid option and if eSigned through AOMS we will upload for you) <input type="checkbox"/> Credit Report <input type="checkbox"/> Identification (SSN & Photo ID) <input type="checkbox"/> Sales Contract (for purchase) <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)	Portfolio Select / Platinum Jumbo: <input type="checkbox"/> Paystubs (Most recent 30 days) <input type="checkbox"/> Tax Returns (Most recent 2 years) <input type="checkbox"/> W-2s/ 1099s (Most recent 2 years) Bank Statement (Business or Personal): <input type="checkbox"/> Business or Personal: Business percentage ownership letter from a 3rd party CPA/Tax preparer <input type="checkbox"/> Business or Personal: Business expense ratio letter from a 3rd party CPA/Tax preparer (refer to AE notes on prequal if required) Investor Cash Flow: <input type="checkbox"/> Borrower Certification of Investment Purpose Disclosure 1099: <input type="checkbox"/> Most recent 1 or 2 years 1099's <input type="checkbox"/> YTD earnings statement	
BROKER COMMENTS/NOTES TO UNDERWRITING		

Mortgagee Clause: Angel Oak Mortgage Solutions LLC | ISAQA, ATIMA | 980 Hammond Drive, Suite 850 | Atlanta, GA 30328



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