



18303 GRIDLEY ROAD, CERRITOS, CA 90703-5401
 PH: (800) 453-7884 FAX: (562) 924-6057

REVERSE MORTGAGE LOAN SUBMISSION FORM

LOAN NO: _____ **Account Executive:** _____

BORROWER NAME: _____

BROKER COMPANY NAME: _____

BROKER COMPANY PHONE: _____ BROKER COMPANY FAX: _____

BROKER LOAN PROCESSOR NAME: _____

BROKER PROCESSOR PHONE: _____ PROCESSOR'S EMAIL: _____

BROKER LOAN OFFICER NAME: _____

BROKER LOAN OFFICER PHONE: _____ LOAN OFFICER'S EMAIL: _____

1 Has any exception been sought previously regarding the parameters of the loan?
 A) YES B) NO

If Yes, please specify: _____

2. Are you requesting any specific Underwriter or Junior Underwriter? (Mention names below)

Underwriter: _____ Junior Underwriter: _____

Additional Instructions (if any):

- Application 1009 (Signed and dated by Borrower(s) and LO)
- Counseling Certificate
- Copy of Drivers License & Social Security Card
- Credit Report
- Preliminary Title Report
- Flood Certificate
- Payoff Demand or Mortgage Bill
- Repair Set Aside (If applicable)
- Termite Report and Bids for any required work. (If applicable)
- Complete FHA Property Appraisal
- RESPA compliant GFE and Borrower's Intent to Proceed
- Truth in Lending Statement (TIL)
- 92900a
- Non-borrowing Spouse Credit Report (For Community Property states)

- Trust Documents (If applicable)
- Copy of Hazard Insurance
- Initial Disclosures / Misc Forms:
 - Amortization Schedule and Initial Loan Calculations
 - Principal Limit Lock Disclosure
 - Anti Churning Form (Applicable only in case of HECM to HECM Refinances)
 - Rate Lock Disclosure
 - Important terms disclosure
 - Other notifications
 - Excessive fees disclosure
 - Tax & insurance disclosure
 - Equal credit opportunity act notice
 - Affiliated business arrangement disclosures
 - General authorization, joint application, and bankruptcy statement
 - Customer identification documentation patriot act
 - Fair lending notice
 - Lead based paint certification (for property built prior to 1978)
 - Total annual loan cost disclosure (TALC)
 - Customer identification certification
 - Consent to social security administration's release of social security number verification
 - RESPA transfer of servicing disclosure
 - Face-to-face opt out disclosure
 - State Specific Disclosures