



Mortgage Request

Purchase

Refinance/ETO

Straight Switch

Broker Name: _____

Broker Phone Number: _____

Broker Email: _____

Borrower's Name: _____

Mortgage position for this request: 1st 2nd 3rd

Amount Desired by Borrower: _____

Borrower's annual interest rate threshold: _____

Your Fee: _____

Description of borrower's financial situation:

Description of borrower's need for funds:

Description of borrower's strategy/plan to repay the loan:

Summarize the property/properties securing loan:

Preferred Closing Date:

Please enclose:

- Include Credit Application
- Current Bureau or Client Consent
- Current Appraisal,
- Current mortgage statement (if applicable)
- Supporting documentation (Income, assets confirmation, etc)

Confidential