

NEW CLIENT PROFILE SETUP



Company Name: _____

Company Address: _____

Company Phone: _____ Fax: _____

Primary Contact Person: _____ Accounting Department Contact: _____

PAYMENT OPTIONS Credit Card Invoice Both

Please provide a list of names and email addresses of any staff who will need automatic email updates and ordering privileges.

LOAN OFFICERS

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

LOAN PROCESSORS

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

Name: _____ Email: _____

FEES

FORM TYPE	SERVICE	FEE
Conventional	FNMA 1004 - URAR+MC	
Conventional	FNMA 1073 - Condo	
Conventional	FNMA 2055 - Exterior Only	
Conventional	FNMA 2075 - Drive By	
Conventional	FNMA 1004D - Final Inspection	
Conventional	1004D - Appraisal Update	
Conventional	FHA to Conforming	
FHA	FHA 1004+MC	
FHA	FHA 2-4 Family	
FHA	Conforming to FHA	
Investment	216 - Operating Income Statement	
Investment	1007 - Rent Schedule	

SPECIAL INSTRUCTIONS

Do you need SSR forms for all files or as requested?

Please list the lenders you currently use.
