

AE Name:

**Website:** <https://www.wholesale.springeq.com/>

**Portal:** <https://www.wholesale.springeq.com/client-login/>

**Submit by uploading 3.4 to our portal or by emailing this, and the items below to:** [BXG@springeq.com](mailto:BXG@springeq.com)

Date:

**Purpose:** Purchase–Piggyback    Refinance–Piggyback    Stand-alone 2nd  
1st Lien HELOC

Primary Borrower's Name:

Email:

Co-Borrower's Name:

Email:

### COMPANY INFO

Mortgage Company Name:

MLO Name:

Phone:

Email:

Processor/Team Name:

Phone:

Email:

### LOAN REQUEST INFO

Proposed HCLTV %

Proposed Rate

Current/Proposed 1st Mortgage Balance: \$

Property Value/Purchase Price: \$

Property Type:    1-U/PUD    2-4 Unit    Condo    2nd Home    Non-Owner Occupied

LOCK TERM:    45-day    60-day

HELOC Adjustable Line    Select One:    3yr-Draw

HELOC Line Amount:\$

Initial Draw Amount: \$

—OR—

HELOAN Fixed

Fixed Loan Amount: \$

Term (5,10,15,20,25,30 Yr):



## IMPORTANT DATES & INFO

Estimated Closing Date:

Supplying an already completed Appraisal (within 12 months)?    Yes    No

## TITLE/ESCROW COMPANY INFO (PIGGYBACKS ONLY)

Reference /Escrow #:

Company Name:

Company Phone Number:

Contact Name:

Contact Email:

## BROKER COMPENSATION INFO

Lender Paid Compensation (Available on Fixed Loans Only)?:    Yes    No

— OR —

Borrower Paid Compensation?:    Yes    No    % of Loan/HELOC Draw:    OR    \$\$ Amount:

## COMPLETE THE FOLLOWING QUESTIONS

- Yes    No    Is any portion of the loan being used to purchase another property?
- Yes    No    Will any portion of the proceeds of this loan be used for home improvement purposes?
- Yes    No    Is any portion of this loan being used to payoff an existing mortgage?
- Yes    No    Will you be using the proceeds for something other than the 3 purposes listed above (purchase, refi, home improvement)?
- Yes    No    Will the Total Financing of all property liens be greater than \$2,000,000.00?
- Yes    No    Will the Total Financing of all property liens be greater than \$3,000,000.00?
- Yes    No    Have you had a late mortgage payment on ANY MORTGAGE LOAN in the last 24 months? Is the subject property in a Flood Zone that requires Flood Insurance?
- Yes    No    Have you been rejected from joining a Credit Union previously?



## ITEMS NEEDED FOR LOAN REGISTRATION

- FNMA 3.4 MISMO Data File
- 1003 Application in PDF format
- This Submission Form
- Piggyback Loans (All): Loan estimate for new first mortgage
- Piggyback Loans (HELOC only) AUS findings
- Stand-alone 2nds only: First mortgage statement or final CD/closing disclosure (if recently closed)

**Please submit to [BXG@springeq.com](mailto:BXG@springeq.com)**

