



**PHOENIX FUNDING**  
*Rising to the challenge*

PHONE#714-428-0099

FAX LOCKS TO 714-428-0095 OR 714-428-1179

**WHOLESALE  
RATE LOCK & DOCUMENTS FORM**

Company: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Loan Officer/Processor: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Phoenix Funding Rep \_\_\_\_\_ Loan# \_\_\_\_\_

Borrower Name: \_\_\_\_\_ Co-Borrower Name: \_\_\_\_\_

SS# \_\_\_\_\_ SCORE: \_\_\_\_\_ SS# \_\_\_\_\_ SCORE: \_\_\_\_\_

Property Address: \_\_\_\_\_ County: \_\_\_\_\_

Loan Program #: \_\_\_\_\_

Term:  30/30  15/15  10yr  7/23  5/25  3/27  2/28  6 mo LIBOR  1 mo LIBOR  
 HELOC  30/15  Option Arm =  30yr term or  40yr term

Lien Position:  1<sup>st</sup> Position  2<sup>nd</sup> Position  Interest Only =  5yr period or  10yr period

Loan Purpose:  Purchase  Rate/Term Refi  Cash-out Refi

Occupancy:  Primary O/O  Second Home  Investor N/O/O

Property Type:  SFR  Condo  PUD  Units (# of Units \_\_\_\_\_)

Doc Type [✓ all that apply]:  Full Doc  Limited Doc  No Doc  No Ratio  Stated Income

NINA (w/employment)  Assets Stated  Assets Verified

Prepayment Penalty:  HARD  SOFT  5 year  3 year  2 year  1 year  6mos  None

Mortgage Insurance:  Yes  No **Impounds:**  Yes  No (LTV's >90.00% require impounds)

Sale Price: \_\_\_\_\_ Appraised Value: \_\_\_\_\_

Loan Amount: \_\_\_\_\_ LTV: \_\_\_\_\_ CLTV: \_\_\_\_\_ DTI: \_\_\_\_\_

Base Rate _____	Base Fee _____	CONFIRMED BY: _____ Date: _____ EXP: _____
Adjustment _____	Adjustment _____	
Adjustment _____	Adjustment _____	
Adjustment _____	Index _____	
Note Rate _____	Net Fee _____ Net Margin _____	
Lock Date _____	Period <input type="checkbox"/> 10-Day <input type="checkbox"/> 15-Day <input type="checkbox"/> 21-Day <input type="checkbox"/> 30-Day <input type="checkbox"/> 35-Day	

**If any amounts are POC please include amount in total column and mark "POC"**

FEE DESCRIPTION	DUE PHOENIX FUNDING	DUE BROKER *	CHARGED TO BORROWER
Origination Fee	_____% \$	_____% \$	= \$
Loan Discount/Cost	_____% \$		= \$
Rebate	_____% \$	_____% \$	= \$
Underwriting	\$1050.00	\$	= \$
Loans over a million	\$1,550.00		
Heloc	\$576.00		
Processing	N/A	\$	= \$
Funding/Doc Prep. Fee		\$	= \$
Flood Cert	26.00	\$	= \$
Credit Report (Broker)			= \$
Appraisal (must comp)		\$	= \$
Desk Review	\$175.00	\$	= \$
Field Review	\$350.00 if applicable	\$	= \$
Broker Fee		\$	= \$
Courier Fee		\$	= \$
Admin. Fee		\$	= \$
Wire Fee			= \$

Closing Entity:  Escrow  Title  Attorney  Other

Company: \_\_\_\_\_ Closing Agent: \_\_\_\_\_

Address: \_\_\_\_\_

Closing Date: \_\_\_\_\_ Phone: \_\_\_\_\_

PICKUP  EMAIL \_\_\_\_\_  FEDEX# \_\_\_\_\_

\* On wet funding states, docs must be returned and checked in before broker funds released

Phoenix Funding Closing Coordinators:

Phyllis Fetalai ext.223, [ploane@phoenix-funding.com](mailto:ploane@phoenix-funding.com) Kaan Cakmak ext. 236, [kaan@phoenix-funding.com](mailto:kaan@phoenix-funding.com)