



FINANCE of AMERICA - REVERSE -

Reverse Mortgage Request Form

Kris Buglino Account Executive KBUGLINO@FAR.COM

\*Counseling must be done prior to application in TN and VT

\*No services can be ordered until the 7th day after counseling in CA

\*NBS in TX is not allowed

Items marked in RED are Required

PRICING/COUNSELING PKG APPLICATION PACKAGE ATTACH TRI-MERGE CREDIT REPORT

LO NAME: LO NMLS ID: GOAL OF PROGRAM: LO COMPANY NAME: REVERSE PROGRAM: LO EMAIL ADDRESS: PURPOSE OF LOAN: LO CELL PHONE: LO OFFICE PHONE: PROPERTY TYPE:

BORROWER INFORMATION table with fields: BWR FULL LEGAL NAME, DATE OF BIRTH, SOCIAL SECURITY #, ARE YOU A US CITIZEN, ARE YOU A PERM RESIDENT ALIEN, MARRIED, ETHNICITY, RACE, FEMALE, MALE, EMAIL ADDRESS, PHONE NUMBER, BWR INCAPACITATED (PHYSICAL), BWR INCOMPETENT (MENTAL), AVAILABLE ASSETS, UNRESOLVED BANKRUPTCY, INTEND TO BUY A FINANCIAL PRODUCT, EXISTING FHA LOAN, POWER OF ATTORNEY, PARTY TO A LAWSUIT, DEFAULT ON FEDERAL DEBT, ENDORSER ON A NOTE.

\*\*IF THE BORROWER IS MARRIED, AND HIS/HER SPOUSE RESIDES IN THE SUBJECT PROPERTY, YOU MUST INCLUDE THE SPOUSE'S INFORMATION BELOW\*\*

CO-BORROWER OR NBS (NON BORROWING SPOUSE) INFORMATION table with fields: BWR FULL LEGAL NAME, DATE OF BIRTH, SOCIAL SECURITY #, ARE YOU A US CITIZEN, ARE YOU A PERM RESIDENT ALIEN, MARRIED, ETHNICITY, RACE, FEMALE, MALE, EMAIL ADDRESS, PHONE NUMBER, BWR INCAPACITATED (PHYSICAL), BWR INCOMPETENT (MENTAL), AVAILABLE ASSETS, UNRESOLVED BANKRUPTCY, INTEND TO BUY A FINANCIAL PRODUCT, EXISTING FHA LOAN, POWER OF ATTORNEY, PARTY TO A LAWSUIT, DEFAULT ON FEDERAL DEBT, ENDORSER ON A NOTE.

PROPERTY INFORMATION table with fields: ADDRESS, CITY, STATE, ZIP, YEAR BUILT, ESTIMATE OF PROPERTY VALUE, PROPERTY SQUARE FOOTAGE, IS THIS THE PRIMARY RESIDENCE, CURRENT MORTGAGE PAYOFF AMT, PROPERTY TAX AMOUNT/MO., TAXES ON TIME PAST 24 MOS, YEARS AT PRESENT ADDRESS, HOMEOWNERS INSURANCE/ MO., HOI PAID ON TIME PAST 12 MOS, PROPERTY HELD IN TRUST, HOA AMOUNT/MO., HOA PAID ON TIME PAST 12 MOS, REFI IN PAST 12 MOS & RECEIVED \$500+ CASH OUT, MIN DEBT PAYMENTS/MO., DOES THE HOME HAVE SOLAR LEASE, BORROWER OWNS ADD'L PROPERTIES, # OF ADULTS 18+ LIVING IN THE HOME, ADD'L LIEN PAYOFF AMOUNT, AN ALTERNATE CONTACT CANNOT RESIDE IN THE SUBJECT PROPERTY, ALTERNATIVE CONTACT NAME, PHONE NUMBER, ALTERNATIVE CONTACT ADDRESS, RELATIONSHIP.

TELL US THE STORY

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STEP BY STEP PROCESS

- 1. PROPOSAL -> 2. COUNSELING -> 3. APPLICATION -> 4. FHA CASE # -> 5. ORDER SERVICES -> 6. SUBMIT TO U/W -> 7. CLOSE/FUND