SYMMETRY
LENDING

Wholesale Submission Form

Date: _____

Purpose: ☐Purchase ☐Refi   **Collateral:** ☐Primary Residence

Submit your loan files via our Direct File Upload, or by emailing them to
wholesale@symmetrylending.com

Primary Borrower's Name: _____ E-mail: _____

Co-Borrower's Name: _____ E-mail: _____

Company Info:

Wholesale Company Name: _____

Broker Company Name: _____

Wholesale Company Contact Name: _____

Phone #: _____ E-mail: _____

Wholesale Account Executive: _____

Loan Request Info:

HELOC Requested Line Amount:	$ _____	Proposed/Current 1st Mortgage Balance:	$ _____
Property Value / Purchase Price:	$ _____	Requested CLTV	_____ %

Important Dates & Information:

Contingency Date: *(If applicable)*	_____	Clear to Close Needed By: _____
Docs Delivered to Title / Escrow:	_____	Proposed Funding Date: _____
Initial Draw Amount Requested:	$ _____	

Items Needed for Initial Submission:

- Symmetry Borrower Authorization signed and dated by all borrowers (We can't start your file without this disclosure. The form MUST be the most current version, found at symmetrylending.com/forms)
- Forms 1003/1008 from 1st mortgage including HMDA Demographic Information Addendum
  NOTE: Stand Alone transactions require a specific form 1003/1008 for the HELOC request
- Tri Merge Credit Report (within 120 days)
- AUS findings if applicable
- All income documentation required by the first mortgage lender (Paystubs required for W2 borrowers if you don't have Day 1 Certainty findings)
- Mortgage statements and proof of tax, insurance, and HOA dues if not escrowed for any other properties

Items to Send As Soon As Possible

- Appraisal (XML format, if available)
  - Received by Symmetry by day 120 of effective date, and loan must close by day 150
- Fully executed purchase agreement (purchase transaction)
- Title Work from 1st mortgage
  - Concurrent transactions require title insurance if 2nd mortgage loan amount > $250,000
  - Post-Closing or 2nd lien Stand Alone requires a Junior Lien or Limited Title Policy. Symmetry can coordinate title and closing.
- Insurance Binder on subject property
- Closing Disclosure on 1st mortgage (to release docs)

NMLS
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