



**RETAIL RATE LOCK FORM**

**LOANS MUST BE LOCKED BY 3:00 P.M. (PST) TO GUARANTEE SAME-DAY PRICING**

L.O.:	NMLS#	Phone:
Processor:	Phone:	E-mail:

**CLS Loan#:**

Borrower:			
Property Address:			
Borrower Mid Fico Score:			Co-Borrower Mid Fico Score:

Loan Type:	Conv. Agency	FHA	VA
Purpose:	Purchase	Rate/Term	Cash-Out
Property:	SFR	PUD	Condo
Occupancy:	Primary	Second Home	Investment
Loan Term:	30YR	15YR	Fixed Other: TERM:
DU Refi + <125	DU Refi + >125	Impounds	

Loan Amount:	Interest Rate:	
Sales Price:	Appraised Value:	
LTV:	CLTV	
Debt Ratios:	QM Qualified:	Lock Period: HCLTV Days
		Investor:

Date of Rate sheet:	Lead Source	Origination
CLS Fees:	% +	(\$ Borrower Credit) \$ Discount Fee
Rate Sheet Gross Price:	Adjustments:	Rate Sheet Net Price: (after all adjustments)

**Pricing Adjustments**

LTV/Fico:      Fico:      Cash-out:      Impounds:      DTI:      Condo/Multi-unit :

CLTV:      Refi:      Non-owner:      Loan Amount:      Adver Mkt:      OTHER :

Requester Signature

Print Name

Date



**DOCUMENT ORDER FORM  
(R)**

**PLEASE SIGN AND FAX BACK TO YOUR A/E OR RM  
DOC ORDER MUST BE RECEIVED BY 4:00 PM**

BORROWER: \_\_\_\_\_ LOAN NUMBER: \_\_\_\_\_

LOAN PROGRAM: \_\_\_\_\_ NOTE RATE: \_\_\_\_\_

LOAN AMOUNT: \_\_\_\_\_ 1ST PAYMENT: \_\_\_\_\_

THE FOLLOWING ARE REQUIRED PRIOR TO ORDERING DOCS: 1) ALL PTD CONDITIONS MUST BE SIGNED-OFF AND APPROVED BY UNDERWRITING  
2) ALL FEES ON GFE & HUD1 MUST MATCH. 3) LOAN RATE-LOCK CONFORMATION. 4) TITLE VESTING 5) ESTIMATED HUD1

	LENDER FEES	BRANCH / LO'S FEES	FEES PAID BY (PLEASE CHECK WHICH PARTY )			POC
			BORROWER	SELLER	BRANCH / LO	
ORIGINATION PTS.	\$	\$				
DISCOUNT PTS.	\$	\$				
APPRAISAL FEE	\$	\$				
CLS FEE	\$	\$				
PROCESSING (MAX. \$695)	\$	\$				
ADMIN FEE	\$	\$				
	\$	\$				
APPRAISAL REVIEW (If Applicable)	\$	\$				
REBATE (YSP)	\$	\$				
		\$				
<b>CLS Total Origination \$</b>			<b>BRANCH / LO'S ORIGINATION: \$</b>			
<b>ESCROWS / IMPOUNDS</b>	** REG. Z REQUIRES DISCLOSURE OF ALL LENDER & 3RD PARTY FEES. CLS DOES NOT COVER BROKER / ASSOC COSTS. CLS WILL ISSUE THE BROKER / ASSOC CHECK 3-5 BUSINESS DAYS AFTER CLOSING; ASSUMING ALL CONDITIONS HAVE BEEN MET. ** PLEASE NOTE: A \$100 E&O FEE WILL BE DEDUCTED FOR ALL LOANS					

ESCROW COMPANY:		ESCROW #:	PHONE#:
TITLE COMPANY:		TITLE #:	PHONE#:
DOCS TO BE SENT VIA: (PLEASE CHECK ONE)	E-MAIL:		PICK-UP
	FEDEX / ACCNT#	COURIER / CONTACT#	

LOAN VESTING			
NAME (S):	GENDER:		MALE      FEMALE
SOLE OWNERSHIP:	SINGLE	UNMARRIED	MARRIED
CO-OWNERSHIP:	JOINT	COMMUNITY	TENANCY IN COMMON

The CALIFORNIA LOAN SOURCE		BRANCH / LO INFORMATION:	
RECEIVED BY:	Date:	Time:	ORDERED BY:      Date:      Time:
PHONE#:	FAX#	PHONE#:	FAX#
<b>LOSS-PAYEE:</b>	The California Loan Source 4 HUTTON CENTRE DR. SUITE 500 SANTA ANA, CA 92707 PHONE: (714) 417-9000 FAX: (714) 417-9055		<b>SIGNATURE:</b>