

MORTGAGE CALL REPORT LOAN INFORMATION SHEET report period: _____ to _____

Must be completed and emailed to poneil@ev1.net for each loan application **active*** during the quarter **(see Below)**

Note: These forms must remain in MCR file for audit, so they must be complete and accurate

[Email Completed Form](#)

poneil@ev1.net

LOAN OFFICER NAME	_____	
LO NMLS	_____	
BORROWER NAME	_____	
RV LOAN NUMBER	_____	
BORROWER CONTACT PH #	_____	
LENDER NAME	_____	
APPLICATION DATE	_____	
EST PROPERTY VALUE	_____	(from Application)
APPRAISAL VALUE	_____	(leave blank if not yet completed)
APPRAISAL DATE	_____	(leave blank if not completed yet)
EST. INITIAL LOAN BALANCE	_____	(From bottom of Loan Comparison)
CLOSING DATE	_____	(leave blank if not closed)
CLOSED LOAN BALANCE	_____	(leave blank if not closed)
FUNDING DATE	_____	(leave blank if not closed)
LOAN DISPOSITION & DATE	_____	(adversed + date, pending, processing, etc)
ANY OTHER COMMENTS	_____	

Loans that need to be reported include the following:

- Loans that were originated prior to beginning of quarter that were still in-process at the beginning of quarter or had not yet been adversed at the beginning of the quarter. -
- Loans that closed between during the quarter**
- Loans originated during the quarter*
- Loans that were adversed (withdrawn, denied, etc) during the quarter**

* Originated loan means any loan application or portion thereof signed by the borrower, if you are not sure, provide a copy of what was completed.

** Loans Adversed during the period must have a credit denial that was completed and sent to the applicant by the LO to be counted as a denial during the period.

Following the end of each quarter, LO's will receive an email alerting them that SFI needs to complete our quarterly Mortgage Call Report in NMLS. In order to complete the NMLS report, detailed information is needed from each LO on their loans as shown above.

The email will give the beginning and ending dates of the quarter.

If you have no loans return the form saying no loans under borrower name

FORMS MAY BE NEEDED FOR COMPLIANCE INSPECTIONS BY TDSML AT ANY TIME