

**MORTGAGE CALL REPORT LOAN INFORMATION SHEET** report period: \_\_\_\_\_ to \_\_\_\_\_

Must be completed and emailed to [poneil@ev1.net](mailto: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](mailto:poneil@ev1.net)

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

**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- Loans that were adversed (withdrawn, denied, etc) during the quarter\*\*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**