



Randy Lewis & Assoc  
Phone 623-773-3600

**CONTRACT SUMMARY**

Property Address \_\_\_\_\_ Seller \_\_\_\_\_ Lender Checklist \_\_\_\_\_  
 Cost Estimate \_\_\_\_\_  
 Agent Name \_\_\_\_\_ Buyer \_\_\_\_\_ "LSR" Attached \_\_\_\_\_  
 (completed by Buyer/Lender)  
 Phone# \_\_\_\_\_ Fax# \_\_\_\_\_

Date Of Offer \_\_\_\_\_ Original Terms \_\_\_\_\_ Counter Offer # \_\_\_\_\_  
 Buyers Marital \_\_\_\_\_ Disclaimer Required Y N \_\_\_\_\_

Purchase Price (pg 1 line 8)	\$ _____	\$ _____
Earnest Deposit (pg 1 line 9) <b>1% Min</b>	\$ _____	\$ _____
Amount Down 0 5% 10% 20% + (pg 1 line 10-12)	Loan Amount \$ _____	
Close of Escrow (pg 1 line 16)		
Possession Date (pg 1 line 22)		
Included Addendums (pg 1 line 25-27) (Circle Those Included) Do We Need <b>SHORT SALE ADDENDUM</b> ?	If our seller, COE + 1 day possession Assumption/Carryback – Water Well – Buyer Contingency – HUD – HOA – Lead Paint – Additional Clause – Septic – Other _____	Does the seller need more time?
Personal Property (pg 2 line 40-45)	__ Refrig __ Washer __ Dryer __ Other _____	Are there items that do not convey?
Type of Financing (pg 2 line 70)	__ Conventional __ FHA __ VA Cash __ Assumption/Carryback	
Discount Points Paid: (pg 2 line 74-75)	__ Buyer __ Seller __ Other Total Discount Points	
A.L.T.A. Policy Paid: (pg 2 line 76)	__ Buyer __ Seller	
Loan Origination Fee Paid: (pg 2 line 77)	_____% of Loan Origination Buyer Seller	
Appraisal Fee (pg 2 line 78)	__ Buyer __ Seller __ Other	Buyer Seller Other
Other Loan Costs Paid by Seller: (pg 2 line 79)	\$ _____	
Escrow Company/Phone # (pg 3 line 91)		
Assessments/Liens (pg 3 line 124-126)	__ Seller __ Prorated to Buyer	*CFD _____
Home Inspection (pg 5 line 182)	# of Days _____ or due by _____	
Proof of Repairs (pg 6 line 243)	Due By _____	
Home Warranty (pg 6 line 260-263) Warranty Company _____	Ordered by: __ Buyer __ Seller Paid For by: __ Buyer __ Seller \$ _____	Ordered by: __ Buyer __ Seller Paid For by: __ Buyer __ Seller
Additional Terms & Conditions (pg 7 line 304-315)  Amount Seller requested to pay toward Buyers closing costs? _____		
Earnest Money (pg 8 line 352-354)	__ Check __ Other __ Escrow Co Broker	
Terms of Acceptance (pg 8 line 362)		
Agency Confirmation (pg 9 line 372)	__ Buyer __ Seller __ Both	



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### Lender Screening and Buyer Qualification Checklist

Buyer Name(s) \_\_\_\_\_ RE Agent Name \_\_\_\_\_

Property Add: \_\_\_\_\_ Loan: Conv\_\_ FHA\_\_ VA\_\_ Other\_\_

LSR Attached? Y N Note dates that lender received written verification \_\_\_\_\_

Mortgage Company Name \_\_\_\_\_ Main Phone# \_\_\_\_\_

Loan Officer Name \_\_\_\_\_ Cell Phone# \_\_\_\_\_

Has full loan application been made? Y N  
If NO, when will appointment be scheduled for? \_\_\_\_\_

Close of Escrow is scheduled for \_\_\_\_\_. Can you make this date? Y N

On scale of 1-10, where would you rate the buyers ability to qualify? \_\_\_\_\_  
What will it take to make this buyer a 10? \_\_\_\_\_

Are you a broker or direct lender ar bank? Do you fund the loan in house? Y or N

How is the buyer(s) job stability? \_\_\_\_\_

Have you reviewed a tri-merge credit report? Y N

What is the buyers credit score or range of credit score? 600-640 650-670 670-700 700-725 725-800

Are there any concerns w/ their credit? Y N

Are there any collections or derogatories? Y N

If YES, have you received necessary explanations? \_\_\_\_\_

Does the buyer have all their funds for down payment and closing costs? Y N

Has this been verified? Y N What is the source? \_\_\_\_\_  
If gift funds, has letter been received? Y N

Seller is contrib to the closing costs \$ \_\_\_\_\_ Is this enough? Y N FHA costs \_\_\_\_\_

DOES THE BUYER HAVE A HOME TO SELL? Y N If yes, does buyer have a plan "B" if home does not record? \_\_\_\_\_

Is it better to contact you or your processor? \_\_\_\_\_

Processor name & # \_\_\_\_\_

What is your companies "typical" process for drawing loan docs? \_\_\_\_\_

How long does it take to get through underwriting? \_\_\_\_\_

How do you fund? Table Wire Do you need 24 hrs after docs have been recvd? \_\_\_\_\_