

NEW CLIENT PROFILE
~ Email to info@clmortgageprocessing.com ~

Date: _____ Name/Title: _____

Broker's License #: _____ NMLS# _____

****PLEASE ALSO FAX A COPY OF YOUR BROKER'S LICENSE AND NMLS LICENSE AS WELL AS A COPY OF YOUR BUSINESS CARD ON YOUR LETTER HEAD****

Mortgage Broker Name: _____

Address: _____

Bus. Main Phone: _____ Direct Bus. line: _____

Cell Phone: _____ Fax: _____

Email Address: _____

Website Address: _____

*Which of the following describes your company? **Broker –or- correspondent Lender?** _____

*Which is your Overnight Courier Account # to be used when receiving broker checks from escrow _____ (circle one): FedEx/UPS, **OR**

Wire Account information: ABA# _____ ACCOUNT# _____

Please answer the following Questions:

- How long with your company? _____
- How long have you been originating loans? _____
- How long have you held your license(s)? _____
- How long have you been in the mortgage industry? _____
- Are you a full-time or part-time? _____
- How many loans do you close per month on an average? _____
- What type of loans do you originate? _____
- _____
- What states are you licensed to originate in? _____
- _____
- How are most of your applications taken; Face to face – Telephone – Internet _____
- What is your current processing situation? In house processing/contract processing/self-processing; _____
- What software do you use? Calyx Point / Genesis / Encompass / Other; _____
- _____
- How did you hear about CLMP? Referral / Google Search / Flyer / other _____

I certify the above answers to my profile are correct.

X _____

Signature/Title/License#