Instructions: To find a specific form, press Ctrl+F (or use “Find” from the Edit Menu) and then search for the information or topic you are looking for. If you don’t find the topic the first time, try variations, different terms or fewer words.

Select one of the following links to go immediately to that section:

- Appraisal Forms
- PRMG Policies, Procedures and Information
- Training/Instructional Material
- General Forms
- Retail Branch Specific
- Checklists
- FHA Forms
- FHA 203K Forms
- VA Forms
- USDA Forms and Links
- Jumbo and Niche Product Forms
- Bond/Housing Authority/DPA Products
- State Specific Forms
- Compliance Information
- Ink Signed Docs
- Alternative Funding Solutions AFS
- Brokered Out

APPRAISAL FORMS
- Appraisal Credit Card Authorization Form
- Appraisal Fee Schedule
- Appraisal Placement Guide
- Appraisal System Links
- General Appraisal Order Form
- PRMG Appraisal Guidelines
- PRMG Appraisal Reconsideration Form
- PRMG Appraisal Transfer Policy
- PRMG VA Appraisal Reconsideration Form
- RELS (ResDirect) Appraisal Reconsideration Form
- VA Appraisal Fee Schedule
- VA Appraisal Transfer Requirements
- VA Case Number and Appraisal Request Form
PRMG POLICIES, PROCEDURES AND INFORMATION

203K Limited Fee Disclosure Information
4506-T - Instructions for Completing
Accessing AllRegs Online
Automated Underwriting System (AUS) Tolerance Requirements
Authorization for Social Security Administration To Release SSN Verification
Community Property States
Condo Review FAQs
Condo-PUD Project Review Manual
DPA Approval List
Electronic Signature Requirements
E-Mail Template for Valuations
E-Sign Consent Form
E-Signing with Adobe Reader
FHA Credit Standards Policy
FHA MIP Matrix
FHA Streamline Minimum Requirements for Submission
FT360 Investor Overlay Screen- FastTrac Loan Notes Requirements
Homebuyer Education Courses
HUD Repair Escrows
Instructions for Completing the 92900-A (Retail)
LDP-GSA Instructions
Mortgage Credit Certificates Information
OFAC Sanctioned Counties
PRMG Loss Payee Clause and Insurance Requirements
PRMG TRID Resource Center Page
Property Tax Rate Table
Retail Lock Policies
State Tax Impound Schedule
Tax Transc. Tax Return Requirements
Underwriter Credit Authority Levels
Underwriting Exception Matrix
Underwriting Exception Policy
USDA Processing Offices by State
VA 2015 Calculation Tool
VA 2016 Calculator Tool
VA Community Property Requirements
VA Geographical Regions for Residual Income Guidelines
VA Loan Guaranty and Required Downpayment Examples
VA Loan Guaranty Calculation Examples
VA Loan Guaranty Calculation Worksheet
VA Loan Limits 2015
VA Loan Limits 2016

<<Return to Top>>
TRAINING/INSTRUCTIONAL MATERIAL
- eConsent Borrower Perspective
- eDisclosures Borrower Perspective
- FHA Mortgagee ID Lookup Table User Instructions
- FHA Refi Credit Query
- FHA Streamlines Made Simple
- Instructions for Completing VA 26-1802a
- PRMG Loan Officer Submission Guidance
- PRMG University YouTube Channel
- Retail Case Number Assignment Requests Instructions
- Reviewing Estimated HUD-1 (Retail)
- VA IRRRL Training PowerPoint
- VA Loan Training Guide 2015

LO Training Support Material
- Loan Origination Overview
- Retail Disclosures
- Mortgage Insurance
- CalHFA Product Training
- WSFHC Product Training

Processor Training Support Material
- Retail Disclosures
- Processing Setup
- Loan Processing
- FHA Case Connection

<< Return to Top >>

GENERAL FORMS
- 4506-T (Editable)
- Age Restriction Property Certification
- Attached PUD-Condo Warranty Form
- Compliant PreQual Letter
- Conventional Gift Letter
- Debt-Asset Worksheet
- DPA Approval Submission Form
- Editable 1003 Loan Application
- Exception Request Form
- FHA/VA Lead Standard Certification for Water Systems
- FHA/VA New Construction Documentation
- Fraud Alert Confirmation
- HOA Full Lender Condo Review Questionnaire
- HOA Full Lender Condo Review Submission Form
- HOA Limited Condo Questionnaire
- HOA PUD Questionnaire
FHA FORMS
FHA Amendatory Clause and Real Estate Certification
FHA Appraisal Logging Instructions
FHA Case Cancellation Request
FHA Case Number Assignment Request-Retail
FHA Case Transfer Request Form
FHA Comprehensive Risk Assessment
FHA Condo Certification
FHA Gift Letter
FHA Identity of Interest
FHA Maximum Mortgage Refinance Worksheets with NTB For Cases ON OR AFTER 9-14-15
Mortgagees Assurance of Completion

FHA 203K FORMS
203K Allowable Costs Worksheet
203K Borrowers Acknowledgment- HUD 92900A
203K Contractor Acceptance Checklist
203K Contractors Resume
203K Homeowner Contractor Agreement
203K Identity of Interest Form
203K Interactive Maximum Mortgage Worksheet For Cases Assigned ON OR AFTER 9-14-15
203K Mortgagees Assurance of Completion
203K Permit Certification Form
203K Rehabilitation Loan Agreements
203K W-9 Form

VA FORMS
New Construction VA Case Number and Appraisal Request
VA Blank NOV (Notice of Value)
VA Case Number and Appraisal Request
VA Cash Out Refinance and IRRRL Worksheet
VA Childcare Expense Letter
VA Counseling Checklist (26-0592)
VA Debt Questionnaire
VA Escape Clause
VA Federal Collection Policy Notice (26-0503)
VA IRRRL Case Number Request- Retail
VA IRRRL Worksheet
VA Loan Analysis (26-6393)
VA Payment Comparison Letter
VA Questionnaire (Debt Letter Procedure, Reserve Status and Nearest Living Relative)
VA Request for Certificate of Eligibility (26-1880)
VA Request for Determination of Value (26-1805)
VA Rights of VA Loan Borrowers (26-8978)
VA Verification of Benefits (26-8937)

USDA FORMS AND LINKS
USDA Attachment 15 – Origination Stacking Order Checklist
USDA Attachment A - Eligible Household and Repayment Income Worksheet
USDA Attachment A - Eligible Household and Repayment Income Worksheet
USDA Attachment C - Origination Stacking Order Checklist
USDA Attachment E - Electronic Delivery (Where to send files)
USDA CFR Part 3555/Handbook 1-3555 Quick Reference
USDA GUS Submission Requirements
USDA Links
USDA Memo on Standardization Process
USDA Notice to Applicants - Income Disclosure
USDA Request for Single Family Housing Loan Guarantee (3555-21)
USDA UW and Closing Matrix

JUMBO AND NICHE PRODUCT FORMS
Diamond Jumbo Eligibility Review Submission Form
Diamond Jumbo Net Tangible Benefits Worksheet
Gold Jumbo Condo and Attached PUD Submission Form
Gold Solar Power Certification
Gold Underwriting Submission Checklist
Internal Jumbo Corporate UW Submission Checklist
Niche Non-Warrantable Condo Questionnaire
Niche Products Borrower ATR Certification
Niche Products Eligibility Review Submission Form
Niche Products Net Tangible Benefit
Niche Products Residual Income Calculation Form
Niche Products Restricted Stock Worksheet

BOND/HOUSING AUTHORITY/DPA PRODUCTS
CalHFA Borrower & Lender Affidavit of Loan Analysis Comparison
CalHFA Borrower Affidavit
CalHFA Borrower Forms
CalHFA Seller Affidavit
CalHFA Tax Return Affidavit
Drawing CalHFA Closing Docs in FT360
Housing Authority Mortgage Insurance Rates in FT360
WSHFC First Payment Notification
WSHFC Underwriter Pre Closing Checklist

<<Return to Top>>

STATE SPECIFIC FORMS
California LE MLDS Addendum
Colorado Tangible Net Benefit Disclosure
Colorado Third Party Fee Disclosure
Illinois Tangible Net Benefit Worksheet
Massachusetts Tangible Net Benefit Worksheet
Massachusetts Title 5 Official Inspection Form
New Mexico Rate Lock Disclosure
Rhode Island Tangible Net Benefit Worksheet
State Specific Net Tangible Benefit
West Virginia Tangible Net Benefit Worksheet

<<Return to Top>>

COMPLIANCE INFORMATION
Applicants Intent to Proceed-Retail-TRID
Branch SAR Referral Form
Changed Circumstance Notification
HPMLs - Section 35
PRMG TRID Resource Center Page
QM Common Prepaid Finance Charges (PFCs) and QM Fees
QM Points and Fees Summary
QM Safe Harbor - Rebuttable Presumption
QM Safe Harbor - Rebuttable Presumption (PRMG UW Version)

<<Return to Top>>

INK SIGNED DOCS
Inked Signed Docs

<<Return to Top>>

ALTERNATIVE FUNDING SOLUTIONS (AFS)
AFS Referral Form
AFS Flow Diagram
AFS Referral File Flow

<<Return to Top>>
BROKERED OUT
Approved Brokered Out List
Brokered Out Policy
New Broker Relation Request and Guidelines Form
US Bank Wholesale Prime Plus Application Submission Form

Brokered Out Lender Information
Angel Oak Information
BAC Information
Bank of the Internet (BOFI) Information
Citadel Information
Civic Information
Mountain West Financial Information
New Penn Information
Residential Acceptance Corporation (RAC) Information
SunWest Information
TCF Bank Information
US Bank Information

<<Return to Top>>