



**CORRESPONDENT CONVENTIONAL
UW SUBMISSION CHECKLIST**

*Please note if you are submitting a Smart Loan for UW
please use the [Smart Loan UW Submission form](#)*

Preferred method of delivery is through Image Central on our website.

For questions regarding that process, please contact NewRez Underwriting Support at 877-700-4622 option 4

Client Name: _____		Client Phone #: _____	
Client Contact: _____	Email: _____	Phone #: _____	
Additional Contact: _____	Email: _____	Phone #: _____	
What is your preferred method of communication?	Email: <input type="checkbox"/>	Phone: <input type="checkbox"/>	
Who is the primary contact regarding UW Questions?	Name: _____	Phone: _____	
	Email: _____		
NewRez Loan #: _____	Borrower Name: _____		
Loan Purpose: <input type="checkbox"/> Purchase -or- <input type="checkbox"/> No Cash Out (Rate/Term) Refinance <input type="checkbox"/> Cash Out Refinance			
AUS Used: <input type="checkbox"/> DU/DO <input type="checkbox"/> LPA			
Property Type: _____		Project Name (Required if property type is condo): _____	

Delegated Clients please explain the reason for submitting to NewRez for Underwriting: _____

Required UW Documents - ALL LOANS:

- Initial & most current loan application(s) (*All demographic addenda data must be complete, with 1003 signed and dated by the loan officer*)
- Appraisal (*if available*)
- 1008 Transmittal Summary
- AUS Findings – Finalized and match loan product registration (DO/DU for FNMA; LPA for FHLMC).
- Credit Report & Supporting Documents (*must contain Fraud Check and Credit Bureau full address & phone number*)
- Income Documentation (*as applicable to loan processing style and/or AUS Findings*)
- Verification of Assets (*as applicable to loan processing style and/or AUS Findings*)
- Fully Executed Purchase Agreement and Addendums (*CA provide Escrow Agreement*)
- Income Calculation Worksheet
- If Property is a Condo submit using guidance in the Project Review Submission Checklist [here](#)
- Multi-State or State Required Borrower Benefit Worksheet (*all owner-occupied standard refinances*)
- State Required Disclosures
- Initial Loan Estimate
- Fully executed 4506-C

***Refer to Product Matrix at newrezcorrespondent.com for product specific documentation requirements.**