



## **CLEARPOINT FUNDING BROKER APPROVAL CHECKLIST**

### **We're so excited to have you on board!**

The following items will be required to complete your on-line application through COMERGENGE. Please have them available to upload through the website when requested.

- SIGNED WHOLESALER BROKER AGREEMENT (downloadable through COMERGENGE)
- SIGNED Loan Originator Compensation Addendum (downloadable through COMERGENGE)
- INCOME STATEMENT AND BALANCE SHEET (Within the last 6 months)
  - o Note to current Comergence brokers, please make sure this is updated in your general documents
- COMPANY NMLS NUMBER
  - o Company licenses, branches and loan officers will automatically update in Comergence
- RESUMES OF ALL PRINCIPALS
- NAMES AND SOCIAL SECURITY NUMBERS FOR COMPANY PRINCIPALS
- W-9 (downloadable through COMERGENGE)

### **ADDITIONAL REQUIRED DOCUMENTS IF APPLYING FOR FHA APPROVAL**

- SIGNED FHA ADDENDUM (downloadable through COMERGENGE)
- PROOF OF EDUCATION AND OR EXPERIENCE
- QC POLICY
- INCOME STATEMENT SHOWING A MINIMUM NET WORTH OF \$25,000.00
- VALID TAX ID

Please contact us at **(877) 937-4887** and select **option 1** to speak with one of our Account Executives.

Please note that ClearPoint Funding is unable to process your application if it contains missing information.