



## CORRESPONDENT CONVENTIONAL UW SUBMISSION CHECKLIST

*Please note if 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 #:
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](http://newrezcorrespondent.com) for product specific documentation requirements.**