



**CORRESPONDENT MEDICAL PROFESSIONAL  
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: _____ Email: _____ Phone: _____
NewRez Loan #: _____	Borrower Name: _____
Loan Purpose: <input type="checkbox"/> Purchase -or- <input type="checkbox"/> No Cash Out (Rate/Term) Refinance	
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*) *Refer to Product Profile for Secondary Valuation Requirements*
- 1008 Transmittal Summary
- Credit Report & Supporting Documents (*must contain Fraud Check and Credit Bureau full address & phone number*)
- Income Documentation
- Diploma (*reflecting eligible medical degree*)
- Verification of Assets
- 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.**