

LOCK REQUEST

This form must be completed and emailed to CorrespondentLocks@planethomelending.com in the following scenarios:

- Manual lock requests when a seller is unable to register a loan in the portal
- **ALL Non-QM and Jumbo locks please fill out the relevant section(s) on page 2**

Section 1. Seller Information

Seller Name: _____ Contact Name: _____

Contact Email: _____ Phone: _____

If the subject file has been registered, please provide the PHL loan number: _____

If a PHL loan number is provided above, please skip Sections 2-4

Section 2. Borrower Information

Borrower Name: _____ Qualifying Credit Score: _____

Co-Borrower Name: _____ Qualifying Credit Score: _____

Section 3. Property Information

Street Address: _____

City: _____ State: _____ Zip: _____

Occupancy: _____ Property Type: _____ Number of Units: _____

Section 4. Lock Information

Product: _____ Program: _____

Note Rate: _____ Lock Period: _____ Margin: _____

Purchase Price: _____ Appraised Value: _____

Loan Amount: _____ LTV: _____ CLTV: _____ DTI: _____

Loan Purpose: _____ If Refinance: Rate & Term Cash Out

Mortgage Insurance (\$): _____ If MI: Lender Paid Borrower Paid?

Escrows: YES NO Anticipated Price: _____ AUS: _____



Section 5. Jumbo Information

Is this a closed loan? YES NO

Application Date: _____ Expected/Actual Closing Date: _____

Primary Borrower Citizenship: _____ Non-Warrantable Condo: YES NO

First Time Homebuyer? YES NO

Bankruptcy? YES NO If Yes, Years since Bankruptcy: _____

Housing Event? YES NO If Yes, Years since Housing Event: _____

Any 30 days late in last 12 months? YES NO

Any 60 days late in last 12 months? YES NO

Any 90+ days late in last 12 months? YES NO

Months Reserves: _____

Section 6. Non-QM Information

Is this a closed loan? YES NO

Application Date: _____ Expected/Actual Closing Date: _____

Primary Borrower Citizenship: _____ Non-Warrantable Condo: YES NO

Doc Type (check one of the below options):

- Full Doc
- 12 Month Bank Statement
- 24 Month Bank Statement
- 12 Month Business Bank Statement
- 24 Month Business Bank Statement
- Asset Utilization
- DSCR
- 1 Year Tax Return
- 12 Month CPA P&L

First Time Homebuyer? YES NO

Bankruptcy? YES NO If Yes, Years since Bankruptcy: _____

Housing Event? YES NO If Yes, Years since Housing Event: _____

Any 30 days late in last 12 months? YES NO

Any 60 days late in last 12 months? YES NO

Any 90+ days late in last 12 months? YES NO

Months Reserves: _____