

Recertification Broker Package Checklist

Please complete and sign all applicable forms. For each applicable item below, please provide documentation and/or information requested. A complete Recertification Broker Application and supporting documentation is required within 30 days. For any questions, please contact your assigned Account Executive.

- Recertification Broker Application:** Complete and sign the application. Include the documentation outlined in this checklist.
- Resumes for key personnel:** (Applicable only if there has been a change in Key Personnel /Principals)
- Current Financials:** Current (within the last 90 days) Balance Sheet and Income Statement. All financial information provided will be held in strictest confidence and will not be released to any outside party.
- Articles of Incorporation or Organization:** Applicable only if there have been any changes in the last 12 months.
- Quality Control Plan:** A current QC Plan (plan must be specific to applicant's company) is required on an annual basis to ensure compliance with Agency regulations.
- W9:** A current W9 is required for recertification with the correct tax classification designated, if LLC, LLC type is required; eg: LLC S,C, or P. If Single Member LLC: Sole Proprietor/Single Member LLC selection is required.

Completed Recertification Broker Package should be sent to:

brokerdesk@jetmortgage.com

JET Mortgage Annual Recertification

COMPANY INFORMATION (REQUIRED)	BROKER'S LEGAL COMPANY NAME		DBA		ACCOUNT EXECUTIVE	
	STREET ADDRESS					
	CITY		STATE	ZIP	FORMAT OF BUSINESS <input type="checkbox"/> Association <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> S Corp <input type="checkbox"/> C Corp <input type="checkbox"/> Partnership <input type="checkbox"/> LLC	
	NLMS#	TAX ID#		YEARS IN BUSINESS		

PRIMARY CONTACT INFORMATION	NAME		TITLE
	CELL PHONE (REQUIRED)		EMAIL

Current Officers of the Company

Principal Officer/ Partner 1 /Owner 1	NAME		SOCIAL SECURITY		PERCENTAGE OF OWNERSHIP
	HOME ADDRESS:				
	CITY:	STATE:	ZIP:	NMLS#	

Principal Officer/ Partner 2 /Owner 2	NAME		SOCIAL SECURITY		PERCENTAGE OF OWNERSHIP
	HOME ADDRESS				
	CITY	STATE	ZIP	NMLS#	

Principal Officer/ Partner 3 /Owner 3	NAME		SOCIAL SECURITY		PERCENTAGE OF OWNERSHIP
	HOME ADDRESS				
	CITY	STATE	ZIP	NMLS#	

Current Lenders

COMPANY NAME	% OF BUSINESS
COMPANY NAME	% OF BUSINESS
COMPANY NAME	% OF BUSINESS

Production

PRODUCTION TYPE	LOAN VOLUME PREVIOUS YEAR	# OF LOANS PREVIOUS YEAR	LOAN VOLUME YTD	# OF LOANS YTD
FHA				
VA				
Conventional				
Jumbo				
Non-QM				
2 nd Trust Deeds				
Totals				

Declarations:

	Yes	No
1. Does the company or any person employed hold ownership or have any interest in other real estate related businesses, such as insurance, escrow, realty, builder, contractor, or appraisal? If Yes, please list entities:		
2. Has your company moved within the past year? If yes, please provide an updated W-9.		
3. Has ownership in your company changed since you were approved with JET Mortgage? If so, please provide updated Articles of Incorporation / Operating Agreement and Authorization Form. Note: Additional information may be required.		
4. Have there been any material changes in the structure of your company?		
5. Is your company, or any of its owners or broker of record, subject to any bankruptcy proceedings?		
6. Has your company, owner(s), or employee(s) been sanctioned or disciplined by any state or regulatory agency?		
7. Is your company or owner(s) involved in any pending litigation?		
8. Has your approval with any Agency or Investor ever been canceled or suspended?		

Comments:

If you answered "yes" to any of the above questions, please explain below. If you need additional space please provide a separate page.

The broker hereby certifies that all information provided is true and accurate and that no material changes have occurred that would impact their approval with JET Mortgage.

Broker of Record / Owner

Date

