



LENDING MANAGER EXPERIENCE DOCUMENTATION QUALIFYING POINTS FORM

State of Utah
Department of Commerce
Division of Real Estate

Complete, sign, notarize, and submit this form along with the **Employer Verification Form**, the **Lending Pipeline**, and the **Loan Manager/Supervisor Experience Form**, if applicable, as part of your Lending Manager experience documentation. *An incomplete form will be denied.*

This form is submitted for (Full Name): _____ NMLS ID: _____

QUALIFIED APPLICANTS MUST QUALIFY ANY ONE OF THREE OPTIONS:

- Option 1:** Within the past five years, provide evidence of three years active full time licensed lending experience and a minimum of 45 *first lien residential mortgages*.
- Option 2:** Within the past five years, provide evidence of a minimum of two years active full time licensed lending experience with additional non-concurrent *equivalency experience; totaling 45 points, 30 of which must be from originating *first lien residential mortgages* (Table I) **and** 15 points from Table II;

Use this table to show qualification for Option 2:

30 points must be accumulated from Table I		Points
First lien residential mortgage loan origination (1 pt/transaction)		
15 points maximum may be accumulated from Table II		
Mortgage Loan Processor	.5 pt/month	
Mortgage Loan Underwriter	.5 pt/month	
Mortgage Loan Manager	.5 pt/month	
Certified Mortgage Pre-Licensing Instructor	.5 pt/month	
Second lien residential mortgage loan origination	.5 pt/month	
TOTAL POINTS ACCUMULATED (must equal a minimum of 45 points)		

*Equivalency experience of one year is equal to 30 months of documented experience working as the following: mortgage loan underwriter, mortgage loan manager, mortgage loan processor, certified mortgage pre-licensing instructor, and registered second-lien residential loan originator.

- Option 3:** Within the past twelve years, provide evidence of ten years of loan management/supervision over no less than five licensed/registered loan originators and applicant's personal origination of at least 15 first lien residential mortgages within the past five years.

I hereby certify that the information provided with this application, including the attached verification form and lending pipeline log, is true and correct. I attest that I have read and will comply with all Utah statutes and rules governing mortgage practice.

Applicant Signature _____ Date _____

State of _____ County of _____ Appeared before me this
_____ day of _____,

_____, who deposes and says that the information listed above is true to the best of his/her knowledge.

(Notary) _____



LENDING MANAGER EMPLOYER VERIFICATION FORM
COMPLETE THIS FORM FOR ALL THREE QUALIFYING OPTIONS

State of Utah
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For each company associated with your qualifying experience you must: obtain signature (notarized) of a direct supervisor, manager, or human resource representative, and submit to the Utah Division of Real Estate. **Make additional copies for each previous employer as necessary.**

Applicant: _____ NMLS ID: _____
 Physical Address: _____ City: _____ State: _____ Zip: _____
 Mailing Address: _____ City: _____ State: _____ Zip: _____
 Phone: _____ Email: _____

Supervisor or human resource representative _____ Title _____
 Company Name _____
 Address: _____ City: _____ State: _____ Zip: _____
 Main Office Phone: _____ Fax: _____

I, _____, the undersigned, do verify that _____, _____
Company Representative Applicant
 who is an applicant for a Lending Manager license, has been working in the following capacity during the period of time indicated:

Indicate on the table only the experiences that apply for the Option you selected. Note that dates cannot run concurrent.

<input checked="" type="checkbox"/>	Experience	From Date:	To Date:
<input type="checkbox"/>	M ortgage loan originator		
<input type="checkbox"/>	M ortgage loan processor		
<input type="checkbox"/>	M ortgage loan underwriter		
<input type="checkbox"/>	M ortgage loan manager/supervisor		
<input type="checkbox"/>	Certified mortgage pre-licensing instructor		
<input type="checkbox"/>	Second lien residential mortgage loan originator		

During that time the applicant worked an average of _____ hours per week.
 While affiliated with this company, the applicant closed _____ transactions, representing a dollar volume of \$_____.
 While affiliated with this company the applicant devoted the following percentage of time in originating first lien residential mortgage loans (secondary loans do not satisfy the qualifying experience requirement) _____%
 I () would () would not recommend the applicant as a lending manager for the State of Utah.

Comments: _____

I hereby certify that the information provided is true and correct.

Signature _____ Date _____

State of _____ County of _____ Appeared before me this _____ day of _____, _____, _____, who deposes and says that the information listed above is true to the best of his/her knowledge. (Notary) _____

