



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 **Lending Manager Employer Verification Form**, the **Mortgage Lending Pipeline**, and the **Loan Manager/Supervisor Experience Form**, if applicable, as part of your Lending Manager experience documentation. **Incomplete forms will be denied.**

Applicants Full Name: _____ NMLS ID: _____

CHOOSE ONLY ONE OF THE FOLLOWING 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 30 closed loans and additional non-concurrent ***equivalency experience; 30 points** must be from originating *first lien residential mortgages* (Table I) **and** 15 points from equivalency experience: see Table II.

Table I – max 30 points must be accumulated from first lien residential mortgage loans			Points
(1 Pt/transaction) Max 30 points			30
Table II – max 15 points must be accumulated from equivalency experience			
Equivalency Experience	# of Months		
Mortgage Loan Processor		X .5 pt =	
Mortgage Loan Underwriter		X .5 pt =	
Mortgage Loan Manager		X .5 pt =	
Certified Mortgage Pre-Licensing Instructor		X .5 pt =	
Second lien residential mortgage loan origination		X .5 pt =	
Max 15 points			15
TOTAL POINTS ACCUMULATED (Max of 45 points total)			45

***Equivalency experience** requires 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. (Document management experience on Page 3)

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 _____, _____
(Applicants Name)

Affirmed before me on this ____ Day of _____ 20____ and proven to me, with satisfactory evidence,
to be the person who appeared before me. _____

(Notary Signature and Stamp)



LENDING MANAGER EMPLOYER VERIFICATION FORM

COMPLETE THIS FORM FOR ALL THREE OPTIONS

State of Utah
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For each company associated with your qualifying experience you must: obtain (notarized) signature of a current 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 #: _____

Physical Address: _____ City: _____ State: _____ Zip: _____

Mailing Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Supervisor or human resource representative _____ Title _____

Company Name _____ NMLS # _____

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.

<input checked="" type="checkbox"/>	Option 1 & 2 Experience	From Date:	To Date:
	Mortgage loan originator		
<input checked="" type="checkbox"/>	Option 2 Equivalency Experience	From Date:	To Date:
	Mortgage loan processor		
	Mortgage loan underwriter		
	Mortgage loan manager/supervisor		
	Certified mortgage pre-licensing instructor		
	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: _____

Company Representative Signature _____ Date _____

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

State of _____ County of _____ Appeared before me this _____ day of _____, 20____, _____, and proven to me, with

(Company Rep)
satisfactory evidence, to be the person who appeared before me. _____

(Notary signature and stamp)

