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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. NMLS ID: Applicants Full Name: 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 max must be from originating first lien residential mortgages; Table I. 15 points max must be from equivalency experience; *Table II*. (Option 2 requires a total of 4.5 yrs experience) Table I - max 30 points must be accumulated from first lien residential mortgage loans originated **Points** during the 2 years of non -concurrent loan origination experience. Verify closed loans on Mort. Lending Pipeline & Employer verification forms (1 Pt/transaction) Max 30 points 30 Table II – max 15 points must be accumulated from equivalency experience. This experience cannot run concurrent to the 2 years of loan origination experience listed in Table I: # of Months **Equivalency Experience** Mortgage Loan Processor X.5 pt =X.5 pt =Mortgage Loan Underwriter X.5 pt =Mortgage Loan Manager Certified Mortgage Pre-Licensing Instructor X.5 pt =Second lien residential mortgage loan origination X.5 pt =Mortgage Jr. Loan Officer/Loan Assistant X.5 pt =15 Max 15 points 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, registered second-lien residential loan originator, or Mortgage Jr. Loan officer/Loan assistant. . 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 _____ State of _____ County of ____ (Applicants Name) Affirmed before me on this _____ Day of ______ 20___ and proven to me, with satisfactory evidence,

(Notary Signature and Stamp)

to be the person who appeared before me.

Rev. 5/23/2018



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

State of Utah Department of Commerce Division of Real Estate

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*.

Physical Address:	Applicant:Physical Address:		NMLS #:				
Phone:							
Supervisor or human resource representative	Maili	ing Address:	City:	State:	Zip:		
Company Name	Phon	ne:	_ Email:				
Company Name	Super	rvisor or human resource representative	1	Fitle			
Main Office Phone: Fax:							
I, the undersigned, do verify that	Addr	ress:	City:	State:			
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 below only the experience for: Option 1 or Option 2 Applicant select only ONE Option) Option 1 & 2 Experience From Date: To Date: Mortgage loan originator Mortgage loan processor Mortgage loan underwriter Mortgage loan underwriter Mortgage loan manager/supervisor Certified mortgage pre-licensing instructor Second lien Residential Mortgage Loan Originator Mortgage Jr. Loan Officer/Loan Assistant During that time the applicant worked an average ofhours per week. While affiliated with this company, the applicant closedtransactions, 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:							
Mortgage loan originator ✓ Option 2 Equivalency Experience Mortgage loan processor Mortgage loan underwriter Mortgage loan manager/supervisor Certified mortgage pre-licensing instructor Second lien Residential Mortgage Loan Originator Mortgage Jr. Loan Officer/Loan Assistant During that time the applicant worked an average ofhours per week. While affiliated with this company, the applicant closedtransactions, 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		is an applicant for a Lending Manager license, has been we	orking in the following	capacity during the per	iod of time indicated:		
Mortgage loan processor Mortgage loan underwriter Mortgage loan manager/supervisor Certified mortgage pre-licensing instructor Second lien Residential Mortgage Loan Originator Mortgage Jr. Loan Officer/Loan Assistant During that time the applicant worked an average ofhours per week. While affiliated with this company, the applicant closedtransactions, 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:	A	Option 1 & 2 Experience	From D	ate:	To Date:		
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Mortgage Jr. Loan Officer/Loan Assistant During that time the applicant worked an average ofhours per week. While affiliated with this company, the applicant closedtransactions, 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:		Certified mortgage pre-licensing instructor					
During that time the applicant worked an average ofhours per week. While affiliated with this company, the applicant closedtransactions, 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:		Second lien Residential Mortgage Loan Originator					
While affiliated with this company, the applicant closed		Mortgage Jr. Loan Officer/Loan Assistant					
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, and proven to me, with	Whill loans	e affiliated with this company, the applicant closede affiliated with this company the applicant devoted the following (secondary loans do not satisfy the qualifying experience rewould () would not recommend the applicant as a least	transactions, representations to the transactions to the transactions of the transactions are transactions. The transactions are transactions are transactions are transactions are transactions.	me in originating first li% State of Utah.			
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(Notary signature and stamp)



Loan Manager/Supervisor Experience Documentation

Option 3 (only) - Use this form to document experience.

Make additional copies for each entity if needed.

State of Utah Department of Commerce Division of Real Estate

I served as the loan manager/supervi	served as the loan manager/supervisor for				
a non-depository institution /deposit	ory institution. (circle	one)			
Fromto month/yearmonth/yea	My title w	vas:	I supervised (num	originators	
I personally and directly supervise 10 of the past 12 years (at a minin	_				
Name	NMLS #	Contact Phone #	From Date: (mo/yr)	To Date: (mo/yr)	



Date:

Rev. 5/23/2018

MORTGAGE LENDING PIPELINE

State of Utah Department of Commerce Division of Real Estate

Provide this information for all three qualifying options

Make additional copies as necessary or provide all information on your own form.

Borrower Name	Property Address City, State, Zip	Phone Number	Loan Amount	Closing Date	
	•				
The information shown above is					
originator. The transaction files are subject to disciplinary action.	e maintained at the office. I am aw	are that the experience is subject	to Division audit. Any r	nisrepresentation is	
Applicant Name:		Entity Name:			
Applicant Signature:		Supervisor/Human Resource Representative Signature:			

Date: