



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** 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 during the 2 years of non –concurrent loan origination experience.			Points
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:			
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 =	
Mortgage Jr. Loan Officer/Loan Assistant		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, 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 _____ 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
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.***

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 below only the experience for: **Option 1** or **Option 2** ← (Applicant select only ONE Option)

	Option 1 & 2 Experience	From Date:	To Date:
<input checked="" type="checkbox"/>	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		
	Mortgage Jr. Loan Officer/Loan Assistant		

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)

