



**To add a branch office to your existing
Liberty Reverse Mortgage Broker Relationship
fax the following documents to:
(866) 791-3184
Attn: Broker Coordinator**

- Wholesale Lending Branch Application (this document).
- System Set Up Form.
- Required Providers if Branch uses different service providers than the Corporate office (Wholesale Program only).
- Copy of all current branch level licenses as required by law in all states in which the branch is requesting approval. If claiming an exemption, provide evidence of such.
- Copies of state specific reverse mortgage loan disclosures for all states in which your Organization is requesting approval.

Wholesale Lending Branch Application

Instructions: All sections must be completed. Incomplete applications will be subject to delay, suspension, or rejection.

Organization's Legal Name

DBA if applicable

Branch Address

Primary Contact at Branch (communication relating to Branch approval status will be directed to this contact)

Phone #

Email Address

Believe. Learn. Earn.™



Branch Licenses

Complete for each state in which the branch is licensed; attach additional sheets if necessary. Include a copy of each license listed. If claiming an exemption, include an explanation and/or evidence of exemption.

State: _____ License #: _____

State: _____ License #: _____

State: _____ License #: _____

Certifications

- The information contained herein and in the attachments is true and correct. Any material misrepresentation contained herein is grounds for termination of the relationship with Liberty Reverse Mortgage, Inc. ("LRM").
- LRM is hereby authorized to verify information from any source disclosed herein.
- The Organization will be subject to recertification annually.

Authorized Signature

Date

Printed Name

Title

Believe. Learn. Earn.™



Required Providers – Branch Location

Organization: _____

Branch: _____

Check here if your branch uses the same Required Providers as your corporate office location and do not complete the remainder of this form.

If participating in the Wholesale Program and the service providers used are different than your corporate office, please list the service providers you plan to use for each of the specified services. This information will be entered into the system in order for the attachment to the Good Faith Estimate to be accurate. Please be sure to include at least one provider for Credit Reports, Flood Determination and Title/Escrow.

Provider #1		
Name	Street Address	City, State, Zip
Telephone number	Relationship*	Provider Type
	#	
Provider #2		
Name	Street Address	City, State, Zip
Telephone number	Relationship*	Provider Type
	#	
Provider #3		
Name	Street Address	City, State, Zip
Telephone number	Relationship*	Provider Type
	#	

* Choose only one of the following options when determining Relationship:

- #1 - The provider is an associate of the Lender.
- #2 - The provider is an affiliate of the Lender without ownership interest.
- #3 - The provider is an affiliate of the Lender with a _____% ownership interest.
- #4 - The provider is a relative of the Lender.
- #5 - The provider has an employment, franchise, or other business relationship with Lender.
- #6 - Within the last 12 months, Lender has repeatedly used the services of this provider.

Believe. Learn. Earn.™



System Set Up Form – Branch Location

Submit this form for all users requiring system access.

If requesting access for more than 3 users or for multiple branch locations, make copies of this form as needed.

Organization: _____

Branch Address: _____

1. Full Name: _____ Title: _____

Phone Number: _____ Email Address: _____

- Access Type: View Users Data Only Contact Type: Primary Contact
 View All Data at Users Branch Loan Originator
 Sales & Marketing
 Operations

2. Full Name: _____ Title: _____

Phone Number: _____ Email Address: _____

- Access Type: View Users Data Only Contact Type: Primary Contact
 View All Data at Users Branch Loan Originator
 Sales & Marketing
 Operations

3. Full Name: _____ Title: _____

Phone Number: _____ Email Address: _____

- Access Type: View Users Data Only Contact Type: Primary Contact
 View All Data at Users Branch Loan Originator
 Sales & Marketing
 Operations

Believe. Learn. Earn.™