MPF Mortgage Operations Questionnaire, page 1 of 2

MPF® Participating Financial Institution – Application
Mortgage Operations Questionnaire

mpf Mortgage Partnership Finance™

Member Name: ___[A]_____   Member #: __[B]____

Please complete this Mortgage Operations Questionnaire as part of the application process for the MPF Program. The purpose of completing this questionnaire is to provide information regarding your mortgage operation, origination, and servicing volume. If you have any questions, please feel free to call your MPF Bank representative.

[C]

1. Mortgage Operations Information
Mortgage operations commenced in _____ year.

a. To which credit repositories do you report? (Check all that apply)

- ☐ Experian
- ☐ Equifax
- ☐ TransUnion
- ☐ Innovis

b. Does your institution use a commercial software package or an in-house computer system for Loan Origination?
☐ Yes   ☐ No

If commercial software, specify the package used.
_____

c. If your institution uses an Automated Underwriting System, please specify.

- ☐ Desktop Underwriter
- ☐ Both
- ☐ Other (specify) _____
- ☐ Loan Prospector
- ☐ N/A

2. Residential 1-4 Family Mortgage Origination Volume (in $1,000s)

Provide originations by product type as of the current year and the previous year. Include total number of loans and originated volume. (Indicate N/A if not applicable)

a.

	Year-to-Date – As of _____		Last Fiscal Year _____	
	Total # of Loans	Origination Volume	Total # of Loans	Origination Volume
All Originations:				
Conventional Fixed Rate:	_____	_____	_____	_____
Conventional ARMs:	_____	_____	_____	_____
Government Loans:	_____	_____	_____	_____

b.

	Year-to-Date – As of _____		Last Fiscal Year _____	
	Total # of Loans	Origination Volume	Total # of Loans	Origination Volume
Total Purchases of Third Party Originated Loans:				
Loans from Correspondents:	_____	_____	_____	_____
Loans from Brokers:	_____	_____	_____	_____

c.

	Year-to-Date – As of _____		Last Fiscal Year _____	
	Total # of Loans	Origination Volume	Total # of Loans	Origination Volume
Loans Sold:				
Fixed Rate Mortgages Sold:	_____	_____	_____	_____
ARM Mortgages Sold:	_____	_____	_____	_____
Sold Servicing Released:	_____	_____	_____	_____

To complete this questionnaire follow the steps below:

A. Enter the member's name.

B. Enter the member's number.

C. Select and/or enter the appropriate responses.

* This is a fillable form, most responses may be typed prior to printing

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To complete this questionnaire follow the steps below (continued):

A. Continue to select the appropriate responses

B. Enter the name of the individual that completed this form for the member and date.

A

3. **Residential 1-4 Family Mortgage Servicing Volume (in $1,000s) and Servicing Information.**

a. List major investors. For each of the following provide the information requested. (Indicate N/A if not applicable.)

Year-to-Date – As of _____

Remittance Type:

	Loan Type: (e.g. A/A, S/S, S/A)	# of Loans Serviced:	Amount Serviced (UPB):
Held in Portfolio:	_____	_____	_____
Investor 1:	_____	_____	_____
Investor 2:	_____	_____	_____
Investor 3:	_____	_____	_____

b. List delinquency information. For each of the following provide the information requested. (Indicate N/A if not applicable.)

Year-to-Date – As of _____

	# of Loans (Conv)	UPB	# of Loans (Gov't)	UPB
30 Days:	_____	_____	_____	_____
60 Days:	_____	_____	_____	_____
90 Days:	_____	_____	_____	_____
Greater than 90 Days:	_____	_____	_____	_____
In Foreclosure:	_____	_____	_____	_____

c. Do you use a service bureau? ☐ Yes ☐ No
   If yes, provide bureau name._____

d. What is your institution's servicing package or in-house computer system for servicing?
   _____

   Does this servicing software or system support the MPF format? ☐ Yes ☐ No

e. Does your institution intend to use an MPF subservicer? ☐ Yes ☐ No

   If yes, provide the name of the subservicer. _____

f. Can your institution send funds using ACH? ☐ Yes ☐ No

g. Is your institution's investor reporting electronic? ☐ Yes ☐ No

Completed By: _____ **B** _____

Date: _____

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Mortgage Operations Questionnaire

Member Name: _____   Member #: _____

Please complete this Mortgage Operations Questionnaire as part of the application process for the MPF Program. The purpose of completing this questionnaire is to provide information regarding your mortgage operation, origination, and servicing volume. If you have any questions, please feel free to call your MPF Bank representative.

1.	**Mortgage Operations Information**

Mortgage operations commenced in _____ year.

  a. To which credit repositories do you report? (Check all that apply)

    _____ Experian   _____ TransUnion
    _____ Equifax   _____ Innovis

  b. Does your institution use a commercial software package or an in-house computer system for Loan Origination?
    _____ Yes   _____ No

    If commercial software, specify the package used.
    _____

  c. If your institution uses an Automated Underwriting System, please specify.

    _____ Desktop Underwriter   _____ Loan Prospector
    _____ Both   _____ N/A
    _____ Other (specify) _____

2.	**Residential 1-4 Family Mortgage Origination Volume (in $1,000s)**

Provide originations by product type as of the current year and the previous year. Include total number of loans and originated volume: (Indicate N/A if not applicable)

a.

	Year-to-Date – As of _____		Last Fiscal Year _____	
	Total # of Loans	Origination Volume	Total # of Loans	Origination Volume
All Originations:	_____	_____	_____	_____
Conventional Fixed Rate:	_____	_____	_____	_____
Conventional ARMs:	_____	_____	_____	_____
Government Loans:	_____	_____	_____	_____

b.

	Year-to-Date – As of _____		Last Fiscal Year _____	
	Total # of Loans	Origination Volume	Total # of Loans	Origination Volume
Total Purchases of Third Party Originated Loans:	_____	_____	_____	_____
Loans from Correspondents:	_____	_____	_____	_____
Loans from Brokers:	_____	_____	_____	_____

c.

	Year-to-Date – As of _____		Last Fiscal Year _____	
	Total # of Loans	Origination Volume	Total # of Loans	Origination Volume
Loans Sold:	_____	_____	_____	_____
Fixed Rate Mortgages Sold:	_____	_____	_____	_____
ARM Mortgages Sold:	_____	_____	_____	_____
Sold Servicing Released:	_____	_____	_____	_____

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Mortgage Operations Questionnaire

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3.	**Residential 1-4 Family Mortgage Servicing Volume (in $1,000s) and Servicing Information.**

a. List major investors. For each of the following provide the information requested. (Indicate N/A if not applicable.)

Year-to-Date – As of _____

Remittance Type:

	Loan Type: (e.g. A/A, S/S, S/A)	# of Loans Serviced:	Amount Serviced (UPB):
Held in Portfolio:	_____	_____	_____
Investor 1:	_____	_____	_____
Investor 2:	_____	_____	_____
Investor 3:	_____	_____	_____

b. List delinquency information. For each of the following provide the information requested. (Indicate N/A if not applicable.)

Year-to-Date – As of _____

	# of Loans (Conv)	UPB	# of Loans (Gov't)	UPB
30 Days:	_____	_____	_____	_____
60 Days:	_____	_____	_____	_____
90 Days:	_____	_____	_____	_____
Greater than 90 Days:	_____	_____	_____	_____
In Foreclosure:	_____	_____	_____	_____

c. Do you use a service bureau?   _____ Yes   _____ No
   If yes, provide bureau name._____

d. What is your institution's servicing package or in-house computer system for servicing?
   _____

   Does this servicing software or system support the MPF format?   _____ Yes   _____ No

e. Does your institution intend to use an MPF subservicer?   _____ Yes   _____ No

   If yes, provide the name of the subservicer. _____

f. Can your institution send funds using ACH?   _____ Yes   _____ No

g. Is your institution's investor reporting electronic?   _____ Yes   _____ No

Completed By: _____

Date: _____