

MPF[®] Participating Financial Institution
MPF Direct Operations Questionnaire



PFI Name: _____

PFI #: _____

Market Area

List all of the state(s) in which you currently originate high-balance (jumbo) mortgage loans (list on separate document if necessary): _____

Operational Processes

Does your organization have the expertise to manually underwrite full documentation loans? Yes No

Does your organization have the capability to scan and upload loan file documentation? Yes No

Loan Originations

Most recent 12 months as of _____

Mortgage Type	
Conforming	%
Jumbo	%
Government	%
Second Mortgage	%
Total	100%

Loan Origination Source	
Retail	%
Broker	%
Correspondent	%
Total	100%

Historical Jumbo Mortgage Originations*

	Year-to-date as of		Previous Year (20)	
	Number of Loans	Dollar Amount of Loans	Number of Loans	Dollar Amount of Loans
Fixed Rate		\$		\$
ARM		\$		\$
Fixed Rate		\$		\$

(Balloon)

***Include loans with a first and second mortgage, combination mortgages or piggyback loans.**

Projected Jumbo Mortgage Originations

	Current Year Remaining		Next Year (20)	
	Number of Loans	Dollar Amount of Loans	Number of Loans	Dollar Amount of Loans
Fixed Rate		\$		\$

PFI Number _____

	As of	
	Number of Loans	Dollar Amount of Loans
		\$

As of					
30 Days Delinquent		60 Days Delinquent		90 ⁺ Days Delinquent	
Number of Loans	Dollar Amount of Loans	Number of Loans	Dollar Amount of Loans	Number of Loans	Dollar Amount of Loans
	\$		\$		\$

As of	
Number of Loans	Dollar Amount of Loans
	\$

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1. Organizational chart
2. Resumes of staff involved in the origination of jumbo mortgage loans

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Key Contacts

Please Note: These contacts will be used for initial PFI set up in the MPF Direct Portal. The individuals named will be receiving important key information related to loans sold under the MPF Direct product. Please provide the most accurate e-mail distribution or contact person so that your organization receives the proper information. If you are unsure of who the contact person should be for each item listed, please contact your MPF Bank.

Security Administrator

The MPF Resolution, as authorized by the governing board of your institution, appointed individuals to conduct transactions related to the MPF Program, which includes the authority to be the MPF Direct Security Administrator on the MPF Direct Portal. The Security Administrator will be allowed to set up users to create/register loans, lock loans and authorize funding of MPF Direct loans using the MPF Direct Portal.

Daily Pricing Distribution:

Definition	Email Distribution
Receives daily pricing	

Due Diligence and Custody Purchase Review Conditions Reports:

Definition	Email Distribution
Conditions Reports from due diligence and custody reviews prior to purchase of a loan	

Loan Purchase Contact:

Definition	Name, Email Address and Phone Number
Coordinate loan purchase(s)	

Completed By:

Signature

Phone

Printed Name / Title

Date