

# Need Multi-Part Forms? Go Green, Go Digital!

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## PLUSFINANCIAL

## MORTGAGE REFERRAL FORM

### Prospect Contact Information

Name: \_\_\_\_\_ Last digits SSN: \_\_\_\_\_  
 Preferred Method of Contact:  Home Phone \_\_\_\_\_  Work Phone \_\_\_\_\_  
 Mobile Phone \_\_\_\_\_  Email \_\_\_\_\_  
 Referral Date: \_\_\_\_\_ Best Time to Contact: \_\_\_\_\_  AM  PM

### Prospect Transaction Information

Rate Quote  
 Pre-Approval  
 Purchase  
 Refinance  
 Letter  
 Assistance

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### Prospect Profile

Mortgage Walk-in  
 Commercial Banking Referral  
 Community Dev. Referral  
 Other Internal Referral

Mortgage Call-in  
 Investment Advisor Referral  
 Finance, HR, Mktg Referral  
 Other

Retail Banking Referral  
 Private Banking Referral  
 Executive Mgmt Referral

Comments: \_\_\_\_\_

### Referral Source Information

Emp. ID#: \_\_\_\_\_ Name: \_\_\_\_\_  
 Position: \_\_\_\_\_ Location/BR#: \_\_\_\_\_

### Mortgage Loan Officer Information

Name: \_\_\_\_\_ Date Received: \_\_\_\_\_

### MLO to Referral Source Follow-Up

MLO to Referral Source Follow-Up					Results
Date	Huddle	Meeting	Call	Comments	
					Qualified Referral <input type="checkbox"/> Y <input type="checkbox"/> N
					Application Taken <input type="checkbox"/> Y <input type="checkbox"/> N
					Loan Funded <input type="checkbox"/> Y <input type="checkbox"/> N
					Team 53 Approved <input type="checkbox"/> Y <input type="checkbox"/> N
					Loan #
					Closing Date

### Regional Management Review/Sign-off and Date

Mortgage Area Sales Manager: \_\_\_\_\_ Retail Regional Manager: \_\_\_\_\_

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