

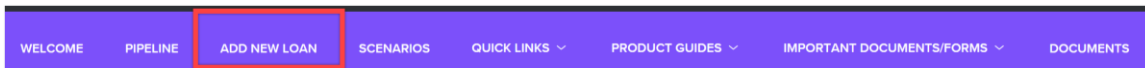
Overview

Clients can submit loans to FGMC using the BOOST portal. This job aid walks through how to upload a loan to request Initial Disclosures and submit a Full Package or Broker Disclosed package to Underwriting. Additional helpful links include the [Broker Resource Page](#), the [Broker Quick Reference Guide](#), and [Ordering an Appraisal job aid](#).

Note: If you are uploading a loan into the BOOST portal, ensure you have a Loan Officer or Loan Processor persona attached to your login.

Step 1: Log into **BOOST**, FGMC’s Broker Portal, at www.fgmc.com/wholesale.

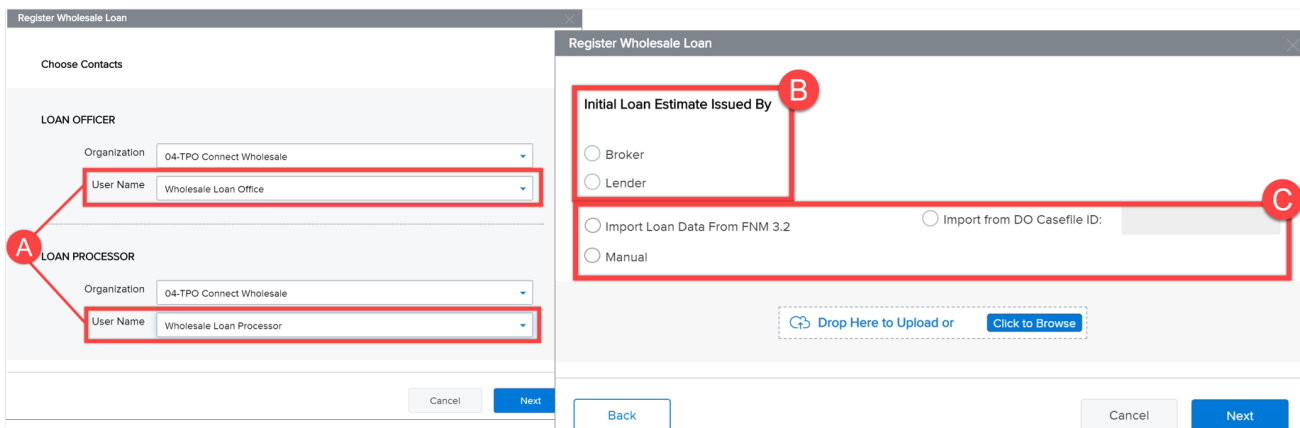
Step 2: Click **ADD NEW LOAN** from the top toolbar.



Step 3: Complete the **Register Wholesale Loan** popup window.

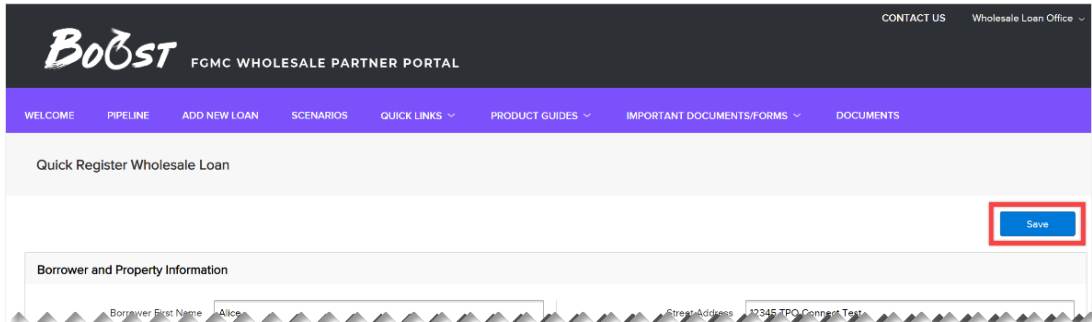
- A.** Make the appropriate selections for the **Loan Officer** and **Loan Processor** and click **Next**.
- B.** Choose who will issue the **Initial Loan Estimate and Disclosures**.
 - Broker
 - Lender (FGMC)
- C.** Select the appropriate option to upload the file.
 - Import loan data from FNM 3.2 file
 - Import from a DO Casefile ID (Enter the casefile ID number.)
 - Manual

Note: If a file is imported via a DO casefile ID, you must be sponsored, and the file must be assigned to FGMC prior to importing.



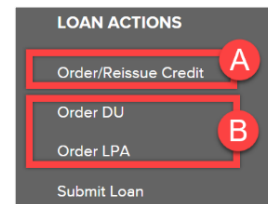
Step 4: Click **Next**. The *Quick Register Wholesale Loan* screen appears.

Step 5: Ensure the information on the Quick Register Wholesale Loan screen is correct and click **Save** to register the loan. *The 1003 form displays.*



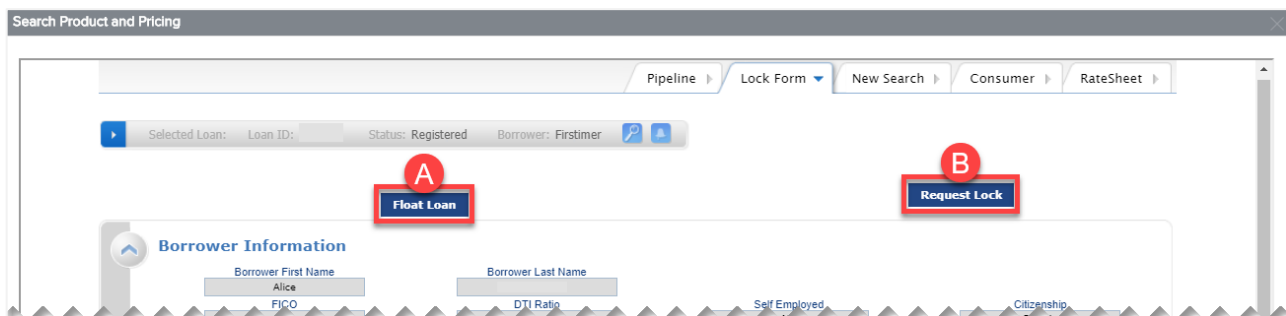
Step 6: Complete the following actions from the **Loan Actions** menu located in the bottom-left corner.

- A. Reissue Credit**
- B. Order AUS** (*results populate in a new window*)
 - DU
 - LPA



Step 7: Select **PRODUCT PRICING & LOCK** to run Product and Pricing.

- A. Float** – This selects the intended product and rate.
- B. Request Lock** – Lock the loan (*if ready*).



Step 8: Select your path to complete your Initial Disclosure request and/or submission to Underwriting.

Three Options to Submit:

- Option 1: [Requesting the Initial Disclosure package \(includes LE\)](#)
- Option 2: [Requesting the Initial Disclosure package and submitting the loan to Underwriting](#)
- Option 3: [Submitting a Broker Disclosed loan to Underwriting](#)

Option 1: Requesting the Initial Disclosure package (includes LE)

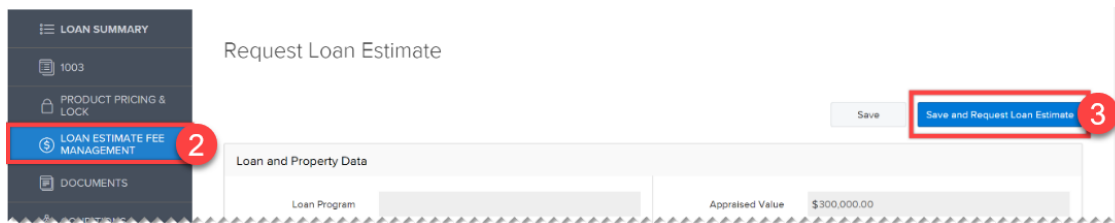
1. Select **DOCUMENTS** from the left menu and upload the following supporting documentation (as required) to the **INITIAL SUBMISSION DOCUMENTS** placeholder.
 - [Wholesale Loan Submission Form](#)
 - 1003 dated with the correct application date
 - Demographic Addendum
 - Borrower Authorization or [Verbal Authorization Form](#) (if 1003 not executed by borrower)
 - Fee Sheet*

***Note:** If you are not uploading a fee sheet, complete the **LOAN ESTIMATE FEE MANAGEMENT** screen.



2. Click **LOAN ESTIMATE FEE MANAGEMENT** and enter all the Loan Estimate fees.
3. Click **Save and Request Loan Estimate**

Note: This notifies FGMC that the loan is ready for initial disclosures. If a Fee Sheet is not uploaded **AND** the Loan Estimate Fee Management screen is left blank, FGMC will determine the appropriate fees to disclose the loan file.

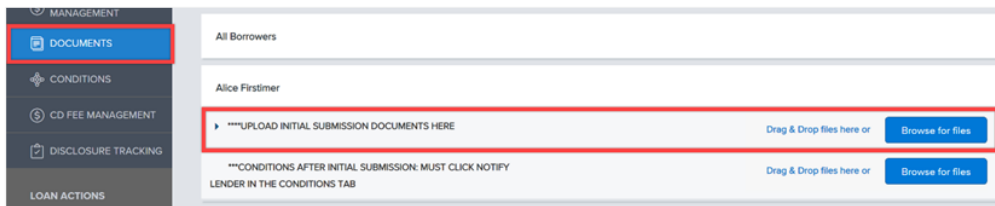


4. **Log out** and FGMC will begin working on the file shortly.

Option 2: Requesting the Initial Disclosure package and submitting the loan to Underwriting

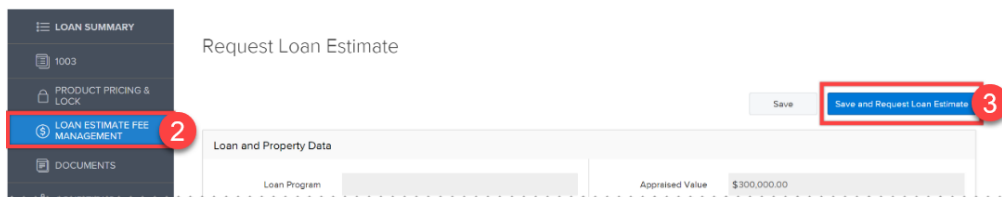
1. Select **DOCUMENTS** from the left menu and upload the following supporting documentation (as required) to the **INITIAL SUBMISSION DOCUMENTS** placeholder.
 - [Wholesale Loan Submission Form](#)
 - Refer to the [QM Submission Checklist](#) for minimum documentation requirements
 - 1003 dated with the correct application date
 - Demographic Addendum
 - Borrower Authorization or [Verbal Authorization Form](#) (if 1003 not executed by borrower)
 - Fee Sheet*

***Note:** If you are not uploading a fee sheet, complete the **LOAN ESTIMATE FEE MANAGEMENT** screen.



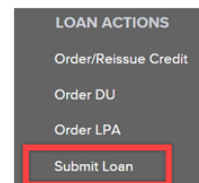
2. Click **LOAN ESTIMATE FEE MANAGEMENT** and enter all the Loan Estimate fees.
3. Click **Save and Request Loan Estimate**

Note: This notifies FGMC that the loan is ready for initial disclosures. If a Fee Sheet is not uploaded **AND** the Loan Estimate Fee Management screen is left blank, FGMC will determine the appropriate fees to disclose the loan file.



4. Click **Submit Loan** from the Loan Actions menu located on the bottom left.

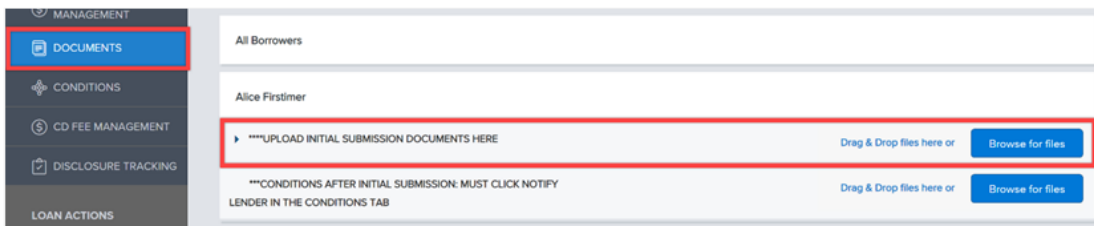
Note: Once the Submit Loan button is selected, the loan is sent to FGMC for Underwriting review. Changes cannot be made to the 1003, Loan Estimate Fee Management screen or Fee Sheet, Credit Report, and AUS.



5. **Log out** to complete the request for initial disclosures and submit for underwriting review.

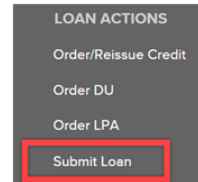
Option 3: Submitting a Broker Disclosed loan to Underwriting

1. Select **DOCUMENTS** from the left menu and upload the following supporting documentation (as required) to the **INITIAL SUBMISSION DOCUMENTS** placeholder.
 - [Wholesale Loan Submission Form](#)
 - Refer to the [QM Submission Checklist](#) for minimum documentation requirements
 - 1003 dated with the correct application date
 - Demographic Addendum
 - Borrower Authorization or [Verbal Authorization Form](#) (if 1003 not executed by borrower)
 - Signed Initial Borrower Disclosures provided by Broker



2. Click **Submit Loan** from the Loan Actions menu located on the bottom left.

Note: Once the *Submit Loan* button is selected, the loan is sent to FGMC for Underwriting review. Changes cannot be made to the 1003, Loan Estimate Fee Management screen or Fee Sheet, Credit Report, and AUS.



3. **Log out** to complete the request and submit the file for underwriting review.