



Please complete all applicable sections and fields and email with supporting documentation to [quickcalc@risetpo.com](mailto:quickcalc@risetpo.com). Please allow 24 hours for a response.

### I. BROKER CONTACT INFORMATION

Broker Company \_\_\_\_\_ Requester Name \_\_\_\_\_  
Requester Email \_\_\_\_\_ Requester Phone \_\_\_\_\_  
OCMBC Account Executive \_\_\_\_\_

### II. APPLICANT INFORMATION

APPLICANT 1 FULL NAME \_\_\_\_\_ Last 4 Digits of SSN \_\_\_\_\_  
Business Name \_\_\_\_\_ Business Type \_\_\_\_\_  
Percent Ownership \_\_\_\_\_ Minimum 2 Years Self-employed ☐ Yes ☐ No

### III. INCOME ANALYSIS

Submit the following documentation for income analysis (self-employed only).

☐ 12 or ☐ 3 Months Bank Statements, which are ☐ Personal or ☐ Business or ☐ Co-mingled (Ask AE)  
☐ Product or ☐ Service business Number of Employees/Contractors \_\_\_\_\_

### IV. LOAN STRUCTURE DESK

Submit the following additional information if you need assistance with credit grade and loan structuring.

☐ 2 Years Tax Returns ☐ Credit Report(s)  
☐ Assets ☐ Lease Agreements (DSCR/No-ratio Loans)  
☐ Business Narrative ☐ \_\_\_\_\_

### V. EXCEPTION REQUEST

If applicable, let us know if you are requesting a guideline exception and explain those details here.

### VI. BROKER COMMENTS

Please share any information you believe will help us structure your loan, including any compensating factors, credit LOE, etc., so we may better serve you.

### VII. LENDER RESPONSE