

# Purchase Advice Research Request



Requested By: \_\_\_\_\_ Gateway Loan Number: \_\_\_\_\_  
Company Name: \_\_\_\_\_ Client Loan Number: \_\_\_\_\_  
Phone: \_\_\_\_\_ Borrower Name: \_\_\_\_\_  
Email: \_\_\_\_\_ Borrower Address: \_\_\_\_\_  
Check Mailing Address: \_\_\_\_\_ Funding Date: \_\_\_\_\_

FHA Case #: \_\_\_\_\_  
Submit this completed form with the reason for reimbursement adjustment and **ALL** required documents to: [paula.friday@gatewayloan.com](mailto:paula.friday@gatewayloan.com) and [allen.herrington@gatewayloan.com](mailto:allen.herrington@gatewayloan.com). Response time is 72 hours.

**Escrow Adjustments** will be considered if request is received within **30 calendar days** of the purchase date.

Escrow Amount Funded: \_\_\_\_\_  
Client's Ending Escrow Balance: \_\_\_\_\_  
Escrow Amount Requested (funds will be reimbursed as a check): \_\_\_\_\_  
Reason for Request: \_\_\_\_\_

**NOTE:** Please stop paying property taxes the day Gateway purchases the loan. This will eliminate property taxes being paid twice.

Mortgage Insurance	Hazard / Flood Insurance	Property Tax
<ul style="list-style-type: none"><li>• Payment History</li><li>• Copy of the payment</li><li>• FHA Connection screen print showing client paid and FHA Case #</li></ul>	<ul style="list-style-type: none"><li>• Proof of payment</li><li>• Copy of declaration or policy</li><li>• Copy of invoice</li><li>• Final Closing Disclosure</li><li>• Proof of refund if hazard company changed after closing</li></ul>	<ul style="list-style-type: none"><li>• Payment History</li><li>• Final Closing Disclosure</li><li>• Proof of payment to applicable county, city, school, etc.</li></ul>

**Principal Balance Adjustments** will be considered if request is received within **30 calendar days** of the purchase date.

Principal Balance Funded: \_\_\_\_\_  
Client's Ending Principal Balance: \_\_\_\_\_  
Principal Balance Requested: \_\_\_\_\_  
Reason for Request: \_\_\_\_\_

- Payment History
- Wire Instructions if preferred payment is wire versus check

**Other Item Adjustments** will be considered if request is received within **30 calendar days** of the purchase date.

Amount Requested: \_\_\_\_\_  
Reason for Request: \_\_\_\_\_

- Copy of Purchase Advice and Note
- Down Payment Assistance Forms (gifts, grants, second mortgage, etc.) if DPA or gift adjustment
- Payment History
- Lock price information if lock price adjustment
- Wire Instructions if preferred payment is wire versus check



Gateway First Bank, Correspondent Lending. Member FDIC. Equal Housing Lender. NMLS 7233. HQ: 244 South Gateway Place, Jenks, OK 74037. Tel: 877.406.8109. Maryland Mortgage Lender License 19468.

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