

How to Submit Loan via TPO Portal

Thank you for choosing AAA LENDINGS. It is our goal to provide you with the best possible service. Please use this guide to help with the loan process about how to submit loan via TPO Portal. If you have any questions, please contact your Account Executive or Loan Coordinator.(coordinator@aaalendings.com).

Note: (1) TPO system can currently only support "Uploading Fannie Mae3.4 file", but not "Manually Input". If you do not have Loan Originator System (Namely you can't create Fannie Mae 3.4 file), please email submission package to email box <u>aaaloan@aaalendings.com</u> for setting up loan submission and disclosure.

(2)If you do not know how to submit the loan, fail to submit or follow up, you can also email loan to Submission Department <u>aaaloan@aaalendings.com</u> for help.

Step1. Import Fannie Mae3.4 xml. File.	2
Step2. Select Loan Program.	
Sten3. Select Contact Information	.5
Step4. Confirm the Summary Information.	5
Step 1. Contract the Loan Summary Information	7
Step6. Unload Submission Package	
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Step1. Import Fannie Mae3.4 xml. File.

- 1. Navigate to The Point Portal (https://main.aaacapitalinvestment.com) and login
- 2. Select the Create New Loan button from the Navigation Bar



	Import	Select program	Contact Email	Summary	Upload
Register New Loan					
Appraisal Tracking					
• VOE Tracking	Step 1 - Option 1		Step 1 - Option 2		
🖺 User Center	v				
Bank Statement Analysis	Drop Fannie Mae Click	A files to Register (or to upload)		Manually register a new loan Enter 1903 Loan Application	
			Nest		
Register New Loan					
Register New Loan	Q 打开		×		
	← → · ↑] « Files > 新建文件夹	v ೮	搜索"新建文件夹"		





Another way is to manually register a new loan.

A Home	Register New Loan		
🗘 Tool 🗸	Register New Loan		
💬 Message			
View Pipeline	Step 1 (2) Step 2 mont Select program	3 Step 3 Contact Email Summary	(5) Step 5
Register New Loan	нарна очном разрони		
Appraisal Tracking			
VOE Tracking	Step 1 - Option 1	Step 1 - Option 2	
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Bank Statement Analysis	Drop Fannie Mae 3.4 files to Register (or Click to upload)	Manually register a new lo Enter 1003 Loan Application	oan -
	_	Next	
	Home / Register New Loan		25 Lar Ciky Chen ~
A Home	Register New Loan Register New Loan		
O Tool	Input Primary Borrower and Property Information	×	
💭 Message	* First Name Middle Name	* Last Name	(6) Step 5
Register New Loan	* SSN Phone Number Please enter phone	Email	Upload
Annraisal Tracking	Property Address		
O VOE Tracking	Zip Code City	State	
🕄 User Center 🗸 🗸	Interest Rate % Loan No		
	Drop Fannie Mae 3.4 files to Register (or Click to upload)	Clear Central Cancel	
	_	Ned	



Step2. Select Loan Program.

Select program Document Type Full Do Alternative Do \$ 680,000.0 e Price s ip US Citize unt s 400,000.00 LTV/CLTV 58.82 Type Se Short Sale Non ige Late 0x30x24 ptcy Non JIE Non DTI please ed-In-Lieu None Company Crown Real Estate & Funding, Inc ACH No Previous

1. Select Full Docs or Alternative Docs

- 2. Select Income Docs Type
- 3. Select Property Type
- 4. Input Credit Score
- 5. Select Loan Type
- 6. Select if impound
- 7. Any other things need to fill in if can not proceed
- 8. Click "view programs" and then choose the rate.

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AAA LENDINGS 117 S Garfield Ave, Alhambra, CA 91801 (626) 566-8651 | NMLS #295075

Eligible Programs (1st MORTG	AGE)						
Program Name	Code	Rate	Price				
WVOE 5/1 ARM	AAAP012	4.625	100.000				
Adjustment Descriptions							
Description	Rate		Price				
		No Data					

Previous Next



Step3. Select Contact Information

Select the correct information of loan officer & processor & loan associate. That must be matched with loan application documents.

Step 1	Step 2	3 Step 3 Contact Email	(4) Step 4 Summary	(i) Step 5 Uplease
Contact Email				
Loan officer " Not a system of processor : plese select a us Loan associate : plese select	user, please re-select a user within the system or within the system a user within the system			
Borrower	aa hfdthfd	Please enter phone		
Loan Officer	Please Select	Please enter phone		
Processor	Please Select	Please enter phone		
Loan Associate	Please Select	Please enter phone		
Loan Ae	Plana Salaci	Parises at the phone		
Loan Coordinator	Pleane Saled	Place of the second	(d)	
		Previous Next		

Have a look on the loan information. If not match, you could correct it in "Loan Summary"

Step	ı ———— Ø	Step 2	Contact Email			p 4 mary		(5) Step 5 Upload		
Summary										
AA										
Borrower				Loan No		AAA				
Property Address				Property Type SFR						
Program	FNMA/FHLMC CONFORMING LOAN	30yr Fixed		Interest Rate	4.125%					
Purpose	Rate/Term	Appraised Value	680,000.00		ITO					
Occupancy Type	Primary Home	Sale Price			Impounds					
Documentation	Full Docs	Loan Amount	400,000.00		PMI		noMI			
FICO	774	LTV/CLTV	58.82% / 58.82%		Comp Plan					



Step4. Check the Summary Information.

Navigate through each tab across the top, from top to bottom.

 Review all information from the left panel to verify the information form the 3.4 file has transferred over accurately The left panel includes: Summary, Loan information, Borrowers, Employment information,

Income & Expenses, Assets & Liabilities, Declarations, and Transaction Details

2. Fill in any fields missing from the 3.4 upload if applicable, then click the "Save" button on the bottom

	≘	C Home							53 🤷 🎒 judy chow 🗸
A Home		Borrower	Progra	am	Status	<i>а</i> .	NoteRate 6%	DTI 37.994%	LTV / CLTV / HCLTV 70%/ 70% / 70%
Tool	Ý	Loan Summary AAAR202206	524001 test990						Application date 66/23/2022
View Pipeline		BORROWER_11 × Co	ombined 1008 +				Total Number	of Borrowers 1	Update XML File Save Submit
🕏 HE LI	^	Borrower information	Borrower						0
Loan Main AAAR20220624001		Employment information		First		Middle		Last	Suffix
Loan Summary		Assets	Name	HE					
D Upload Submission Files		Liability&Real Estate	SSN	350-96-3081		DOB	08/18/1973	Age 4	18
Related Documents		Loan Addendum	Citizensnip	US Citizen					
Lock Rate		Dupdate 1008	Frist Name		Middle Name		Las! Name	Suffix	
Change Of Circumstance Change Of Circumstance									0
Contacts			Add Marital Status&De	pendents					
Condition List			Married			Dependents	2		
Appraisal Apply			Separation			Ages	13,9		
Appraisal Refund Apply				dum					

Note: For purchase, must input the "Down payment"



Step5. Upload Submission Package.

Click "Upload Submission Files" and then Click "Submit" to upload the submission package. If you are ready submit this loan. please click "Submit to Loan Set-Up red button".

A Home						
🗘 Tool 🗸	Borrower	Program 30yr Fixed	Status Registered	NoteRate 3.375%	26.879%	LTV / CLTV / HCLTV 54.55%/54.55%/0%
💬 Message						
View Pipeline			•Drop PDF files	(one or more)		
			(for Click to	upload)		
Loan Main AAA					~	
🖹 Loan Summary	Please Enter					1
D Upload Submission Files	NOTE! if you are ready submit a loan.please cli	ck Submit to Loan Set-Up red button			Su	Bonto File Management
Conditions						Submit to Loan Set-Lin
Related Documents						
Lock Rate	Submission Stacking Order Checklist					
A Change Of Circumstance	Condition					
CD/Doc Request	TRANSMITTAL SUMMARY 1008					
A contents	SIGNED AND DATED 1003 BOTH BORROWER	& MOL (REQUIRED)				
En Contacts	CREDIT REPORT & CREDIT SUPPLEMENT IF /	PPLICABLE(REQUIRED)				
Register New Loan	LOE FOR ADDRESS VARIATION & IN QUIRIES	WITHIN 120 SHOWING ON CREDIT REPORT				
🗄 User Center 🗸 🗸	INCOME DOMENTATION (REQUIRED)					

After submit, you can find the status of the loan on pipeline

eline			Loan No	Company Name	Borrower	Current Status	Program	Loan Amount	Rate	Lock Exp	Registered	Submitted	Initial Approval	CTC	Condition in	Comment	Purc d Action
New Loan		>						\$	5.125		04/11/2022	04/12/2022			(3)		Status Control
Tracking		>							5.125						(0)		Status Control
Tracking		>							5.500						(0)		Status Control
king		>							5.125						(3)		Status Control
	~	>							5.625						(2)		Status Control
ter	~							Total	5 10/pa	ge 🤟 <	1 > Go	to 1					