

Margin Holdback Election Form

As an approved Cardinal Financial Non-Delegated Correspondent client, you have the ability to build your margin/holdback into the base pricing displayed in Octane. Please complete the following table to indicate your selected margin values for each loan type.

Loan Type	Margin Value %	Minimum Margin Value (\$)	Maximum Margin Value (\$)
Conventional			
VA			

Important: After your initial margin election, all changes must be submitted using this form and returned to your Account Executive for review and approval.

Correspondent Information

Company Name: _____

Contact Name: _____

Email: _____

Phone: _____

Authorized Parties for Future Changes

Please list individuals authorized to request future margin election changes:

Name: _____ Title: _____

Name: _____ Title: _____

Signatures Required

Principal's Name (Printed): _____ Title: _____

Principal's Signature (Printed): _____ Date: _____

Instructions: Please complete this form in its entirety. For questions, please contact your designated Account Executive.