
Broker Training Preparation

Cardinal Financial Company - Wholesale

Schedule your Training Here: <https://go.oncehub.com/TPOtraining>

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Overview

CFWholesale's training is designed to give you a one-on-one experience that will not only train you on how to use Octane but also understand Octane specific to your needs. We require a live loan for each training call, but this is what sets us apart from other lenders. Not only are we training you and your entire team, but by the end of the call we will have either disclosed and/or submitted your loan to underwriting. Our training is built to give you the most out of each and every training session.

TPO Training Contact

Email: TPOTraining@cardinalfinancial.com

Training Link: <https://go.oncehub.com/TPOTraining>

Training Requirements

Training Preparation Requirements

Before you schedule your training with our TPO Success Coordinators you will need to complete the following:

1. Getting Started

- Confirm your Broker Compensation and Credit Reporting agency is correct on the Comergence website.
- Compensation is listed on the Broker Agreement form
- Credit Reporting Agency is on the Octane Onboarding Forms.
- If you are unsure, left the form blank, or the information is incorrect- Contact your Account Executive (AE) to add/update this information before you schedule your training.

2. Activate Octane

- You will receive an email with the subject line "Activate your Octane Account" with step by step instructions on how to set up your login credentials.
 - If you did not receive an activation email for Octane, contact your AE and they will resend the activation email.

Note: Your LO *MUST* be active in Octane to register the loan.

3. Schedule Training

- **Use the link to schedule your training call 24-hours in advance.**
 - <https://go.oncehub.com/TPOTraining>

- Urgent - Same day request must be scheduled by your AE.

4. Training Preparation

- **Checklist for All Loans**

- Complete 1003 / 3.2FMN File
- If married, need spouse Name, Address, SSN, DOB, and Email
- Email for all borrowers / non-applicants title holders (Unique to each)
- Credit Reference ID number
- Credit Inquiries information
- Tax Filing status ('19, '18, '17)
- Gift Fund Information

- **VA Loans - Additional Information**

- Veteran Type - Regular Military, National Guard, Surviving Spouse
- VA Occupancy
- VA Benefits Subsequent Use
- Funding Fee Exempt - Disabled
- Relative Not Living with Veteran
- DD214 - Military Service
- Beginning and end dates of service Branch

References

Reference List

[Comergence](#)

[3.2 Upload Checklist](#)

Note: In order to view the reference lists documents above, you must be logged into Octane.

Revision History

Date	Description	Approver
9.25.2020	Initial Release	Stephanie Simon
10.6.2020	Revised	Timothy Williams
12.1.2020	Change Summary	Stephanie Simon
