

LOAN SUMMARY FORM

BORROWER INFO:

Borrower Full Name:
Social Security #: (to pull credit)
Home Phone:
Cell Phone:
Work Phone:
Email Address:
Date of Birth:
Years in School
of dependents and ages:

CO-BORROWER INFO:

Co-Borrower Full Name:
Social Security #: (to pull credit)
Home Phone:
Cell Phone:
Work Phone:
Email Address:
Date of Birth:
Years in School
of dependents and ages:

PROPERTY INFO: (need a two year history of housing)

Subject Property Address:
Current Address if different from above:
How long have you lived at current address:
If less then two years what was your previous address?

Purchase or Refinance:
Property Type: Single Family Condo 2-4 Family IF 2-4 WHAT IS IT?

Estimated Yearly Property Taxes: Estimated Home Owners Insurance:

If Purchase:

Sale Price:
Down Payment:
Year property was built:

If Refinance:

Approx Appraised value of home:
Existing 1st Mortgage Amount:
Existing 2nd Mortgage Amount: (if applicable)
Desired Loan Amount:
Year Property was purchased:
Original Sale Price:
Year property was built:

BORROWER EMPLOYMENT INFO: (need a 2 year history of employment)

Current Employer:
Title:
Address:
Years on the job:
Years in that line of work:
Current Yearly Income:

If you have been at this job for less than two years who was your:
Previous Employer:
Title:
Address:
Years on the job:
Years in that line of work:
Yearly Income:

CO-BORROWER EMPLOYMENT INFO: (need a 2 year history of employment)

Current Employer:
Title:
Address:
Years on the job:
Years in that line of work:
Current Yearly Income:

If you have been at this job for less than two years who was your:
Previous Employer:
Title:
Address:
Years on the job:
Years in that line of work:
Yearly Income:

ASSETS:

Checking/Savings:

Bank:

Total Amount:

Retirement Accounts:

Bank:

Amount:

Investment Accounts:

Bank:

Amount: