



New Information Sheet - 1003 Review

Name:

Referral Source:

We received your application. Thank you!

Loan Program: VA | Conventional | FHA

FTHB?

VA?

Want to go over your application and book your consultation with Steve

Type: Purchase | Refi | Renovation | Primary | Investment

Timeline:

Borrower:

- SS Confirmed
- DOB Confirmed

Co-Borrower:

- SS Confirmed
- DOB Confirmed

Employment Check – confirm 2 years

Current Address – confirm 2 years: Renting | Owning

- Monthly Payment: _____
- Purchase contingent on the sale?: Yes | No | N.A.

Properties Owned: Yes | No

- Renting Out?: Yes | No
- Rental Agreement Details:
- Escrowed?: Yes | No
 - Yes – Mortgage Statement & HOA Bill
 - No – Home Insurance Bill & HOA Bill

Assets Check

- Down Payment Percentage:**
- Where will the down payment come from:**
- How much would you like to bring for total Cash to Close (DP, CC, Prepays)?**
- What's your monthly payment goal:**

MBA

- CAF _____
- PAN _____
- Photo ID _____
- CB Photo ID _____
- Paystubs _____
- CB Paystubs _____
- W2 _____
- W2 _____
- CB W2 _____
- CB W2 _____
- DU Approval _____
- MBA Checklist _____
- Conversation Log: "MBA UNDERWRITER" _____
 - Notes, Income, Credit Report
- General Information _____
 - MBA Underwriter
 - Please See Notes in File

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- Docs Uploaded?: Yes | No
- Book Appointment:**

Do you have any questions about structure, products and programs you would like for me to include in my notes for Steve?

Borrower Information

Borrower:
Co-Borrower:
Referral Partner:

Type

Rate Shopper | Save-A-Deal | FTHB | Game Plan (Credit Repair) | Game Plan (Cash to Close) | Not Ready | Ready | Fast Deal (Contract In OR Ready to Submit Offer)

Goals

Speed:
Monthly Payment:
Cash-to-Close:

1003 Review

SS (Social Security) Verified
DOB Verified
Declarations Check (Citizenship)

Credit

Credit Pulled – Mid Score:
Credit Report Reviewed

Income:

Employment / Income Verified
VOE Ordered (if possible)

DU

Credit Notes:

Notes: