

DATE: \_\_\_\_\_ TIME: \_\_\_\_\_ LOAN OFFICER: \_\_\_\_\_

PURPOSE OF LOAN: ☐ REFINANCE ☐ PURCHASE ☐ CONSTRUCTION ☐ EQUITY LINE

PRIMARY BORROWER: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/19\_\_\_\_ SSN: \_\_\_\_\_-\_\_\_\_-\_\_\_\_\_

PHONE (H): (\_\_\_\_) \_\_\_\_\_-\_\_\_\_ PHONE (W): (\_\_\_\_) \_\_\_\_\_-\_\_\_\_ PHONE (C): (\_\_\_\_) \_\_\_\_\_-\_\_\_\_

CO-BORROWER: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/19\_\_\_\_ SSN: \_\_\_\_\_-\_\_\_\_-\_\_\_\_\_

PHONE (H): (\_\_\_\_) \_\_\_\_\_-\_\_\_\_ PHONE (W): (\_\_\_\_) \_\_\_\_\_-\_\_\_\_ PHONE (C): (\_\_\_\_) \_\_\_\_\_-\_\_\_\_

CURRENT ADDRESS: \_\_\_\_\_

House No. Street City State Zip

**FOR PURCHASE (LISTED HOME):**HOME TYPE: ☐ SINGLE FAMILY ☐ DUPLEX ☐ MULTIPLEX ☐ TOWNHOME ☐ CONDO

EST. MARKET VALUE: \$ \_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_

House No. Street City State Zip

**FOR REFINANCE:**HOME TYPE: ☐ SINGLE FAMILY ☐ DUPLEX ☐ MULTIPLEX ☐ TOWNHOME ☐ CONDO

CASH OUT: Y / N AMOUNT: \$ \_\_\_\_\_ REASON(S) FOR CASH: \_\_\_\_\_

EST MARKET VALUE OF HOME: \$ \_\_\_\_\_ TAX VALUE: \$ \_\_\_\_\_

YEAR PURCHASED: \_\_\_\_\_ YEAR BUILT: \_\_\_\_\_ ORIGINAL COST: \$ \_\_\_\_\_

HOW LONG IN HOME? \_\_\_\_\_ ESCROW: Y / N MORTGAGE INS: Y / N AMT PER MO: \$ \_\_\_\_\_

CURRENT MORTGAGE HOLDER: \_\_\_\_\_ MTG TYPE: \_\_\_\_\_

INTEREST RATE: \_\_\_\_\_ TERM: \_\_\_\_\_ YRS LEFT: \_\_\_\_\_ BALANCE: \$ \_\_\_\_\_ MO PMT: \$ \_\_\_\_\_

2<sup>ND</sup> MORTGAGE/LINE OF CREDIT HOLDER: \_\_\_\_\_ MTG TYPE: \_\_\_\_\_

INTEREST RATE: \_\_\_\_\_ TERM: \_\_\_\_\_ YRS LEFT: \_\_\_\_\_ BALANCE: \$ \_\_\_\_\_ MO PMT: \$ \_\_\_\_\_

**EMPLOYMENT HISTORY: (BORROWER)**

EMPLOYER NAME: \_\_\_\_\_

EMPLOYER ADDRESS: \_\_\_\_\_

POSITION/TITLE: \_\_\_\_\_ YRS ON JOB: \_\_\_\_\_

GROSS INCOME: \$ \_\_\_\_\_ (MO / YR) PAID ON: ☐ W-2 ☐ 1099 ☐ SELF EMPL

PREVIOUS EMPLOYER/PART TIME EMPLOYMENT INFO: \_\_\_\_\_

\_\_\_\_\_

**EMPLOYMENT HISTORY: (CO-BORROWER)**

EMPLOYER NAME: \_\_\_\_\_

EMPLOYER ADDRESS: \_\_\_\_\_

POSITION/TITLE: \_\_\_\_\_ YRS ON JOB: \_\_\_\_\_

GROSS INCOME: \_\_\_\_\_ ( MO / YR ) PAID ON: ☐ W-2 ☐ 1099 ☐ SELF EMPL

PREVIOUS EMPLOYER/PART TIME EMPLOYMENT INFO: \_\_\_\_\_

**REVOLVING DEBT/MONTHLY OBLIGATIONS:****Majority of this information will be obtained via the credit report.**

DO YOU PAY CHILD SUPPORT OR ALIMONY?: Y / N AMOUNT/MO: \$ \_\_\_\_\_

REAL ESTATE TAXES: Y / N YEARLY: \$ \_\_\_\_\_ MO (IF KNOWN): \$ \_\_\_\_\_

HOME INSURANCE: Y / N YEARLY: \$ \_\_\_\_\_ MO (IF KNOWN): \$ \_\_\_\_\_

CREDIT HISTORY: ☐ EXCELLENT ☐ GOOD ☐ AVERAGE ☐ CHALLENGED

AGREE TO CREDIT CHECK: Y / N DATE: \_\_\_\_\_ TIME: \_\_\_\_\_ SCORE: \_\_\_\_\_

HAVE YOU HAD ANY LATE PAYMENTS ON YOUR MORTGAGE (PAST 12 MO) Y / N

DESCRIBE CREDIT ISSUES (JUDGEMENTS, BANKRUPTCY, COLLECTIONS): \_\_\_\_\_

**ASSETS:**

CASH IN BANK ACCOUNTS (include savings &amp; checking): \_\_\_\_\_

INVESTMENTS (including 401K, brokerage accounts, stocks, bonds Etc...): \_\_\_\_\_

PROPERTY (including rental units, cabins, 2<sup>nd</sup> homes & land): \_\_\_\_\_**NOTES:**

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