



Loan Questionnaire - Refinance

Borrower 1

Borrower 2

1. Personal Information:

Full Name

Current Address

How long have you been there?

If current address is less than 2 years,

Previous address

How long have you been there?

Rent or Own?

Social Security Number

Are you a US citizen?

If no, what is your legal status?

Date of Birth (MM/DD/YYYY)

Marital Status (Married/Unmarried)

Phone Number

Email address

Do you have any short sale/foreclosure/bankruptcy?

If yes, when was it? (MM/YYYY)

2. Employment (MUST provide FULL 2 years)

W-2 or Self-Employed?

Current Employer Name

Work address

HR phone number

Position

Gross Income

Approx. Start Date

Time in this line of work

If Self-employed:

Is your business an LLC or Corporation?

If yes, do you own more than 25% of the
company?

Former Employer Name

(if current employment is less than 2 years)

Address

HR Phone Number

(no need if your company is big)

Position

Income

Approximate Start Date

End Date

3. Assets:

Bank Name _____

Balance (approximate) _____

4. Subject Property:

Subject Property Address _____

Property type (Single Family, Condo, Townhouse)? _____

Is this your primary residence/ investment property/ second home? _____

Is there solar on your property? _____
If yes, is it a loan or a lease? _____

Who are currently on title of the property? _____

Will there be any changes to the title? _____
If yes, please specify the changes: _____

5. Loan Information:

Current Mortgage Balance: _____

New Loan Amount You want: _____

Purpose of Refinance (Lower rates/ Cash-out)? _____

Is there a 2nd lien (HELOC or Loan) on this house? _____
If yes, what is the balance? _____

Loan program you want (30-yr, 15-yr, etc...): _____

Would you want an Impound (Escrow) Account? _____

What is the desired Interest Rate/Cost? _____

6. Other Real Estates:

Do you own any other properties other than subject? _____
If yes, how many? _____

Please list all the other properties that you own:

Property Address	<div></div>	<div></div>
	<div></div>	<div></div>
Mortgage Balance	<div></div>	<div></div>
	<div></div>	<div></div>
Type of property (Single Family/Condo/Townhouse)	<div></div>	<div></div>
	<div></div>	<div></div>
Is this your primary residence/ investment or 2nd home?		
Monthly HOA (if any):	<div></div>	<div></div>
	<div></div>	<div></div>
Monthly Rental Income (if any):	<div></div>	<div></div>
	<div></div>	<div></div>
Property Address	<div></div>	<div></div>
	<div></div>	<div></div>
	<div></div>	<div></div>
Mortgage Balance	<div></div>	<div></div>
	<div></div>	<div></div>
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Monthly Rental Income (if any):	<div></div>	<div></div>
	<div></div>	<div></div>
Property Address	<div></div>	<div></div>
	<div></div>	<div></div>
	<div></div>	<div></div>
Mortgage Balance	<div></div>	<div></div>
	<div></div>	<div></div>
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Monthly Rental Income (if any):	<div></div>	<div></div>
	<div></div>	<div></div>

Please send over the following documents:

1. Latest 2 months bank statements (ALL PAGES)
2. Latest 1 month paystubs
3. Latest mortgage statements on all of your properties
4. Current insurance statement on all of your properties
5. If W-2 employee: last year federal tax return and W-2
6. If self-employed, 2 years federal income tax return AND 2 years business tax returns (if own 25% or more in the company).

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Thank You for Your Business