DATE: ______________ TIME: ______________ LOAN OFFICER: Daniel Matthews, NMLS MLO#8961

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

PRIMARY BORROWER: ____________________________ DOB: ______________ SSN: ________________

PHONE (C): ____________________ PHONE (H) : ____________________ e-MAIL ________________________

CO-BORROWER: ________________________________ DOB: ______________ SSN: ________________

PHONE (C): ____________________ PHONE (H) ____________________ e-MAIL ________________________

CURRENT ADDRESS: ____ ☐ RENT ☐ OWN ______________

House # Street City/State/ZIP # Years There

FOR PURCHASE (LISTED HOME):

HOME TYPE: ☐ SINGLE FAMILY ☐ DUPLEX ☐ MULTIPLEX # Units ______ ☐ TOWNHOUSE ☐ CONDO

EST. MARKET VALUE: $ ____________________________ PURPOSE: OWNER-OCCUPIED ☐ INVESTMENT ☐

ADDRESS: ____

House # Street City State ZIP

FOR REFINANCE:

HOME TYPE: ☐ SINGLE FAMILY ☐ DUPLEX ☐ MULTIPLEX # Units ______ ☐ TOWNHOUSE ☐ 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: $ ____________

2ND 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 & checking): ______________________________

INVESTMENTS (including 401K, brokerage accounts, stocks, bonds Etc…): ______________________________

PROPERTY (including rental units, cabins, 2nd homes & land): ______________________________

NOTES: ______________________________

____

____

____

Note: This is not a mortgage application. It is, however, a first step toward mortgage pre-qualification.

Please complete this form and return to:

Daniel Matthews, NMLS #MLO 8961
daniel@americannationwide.com
Phone: (781) 910-5626

I will contact you promptly with any further questions, documents needed, and to obtain authorization to pull and review your credit for mortgage pre-qualification review.