

**Questionnaire take 1 for each borrower** edited 2-26-24**Date:** \_\_\_\_\_**Referred by(REALTOR):** \_\_\_\_\_ **With:** \_\_\_\_\_**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_**Borr Name** \_\_\_\_\_ **Contact** \_\_\_\_\_**Name (like on DL & SS Card)** \_\_\_\_\_ **Male** \_\_\_\_\_ **Female** \_\_\_\_\_**Do you want your Middle initial on the application** \_\_\_\_\_ **Y** \_\_\_\_\_ **N** \_\_\_\_\_ **Jr. Senior?** \_\_\_\_\_**SS#** \_\_\_\_\_ **DOB** \_\_\_\_\_ **Credit Score** \_\_\_\_\_ **OK to pull credit** \_\_\_\_\_**Cell #** \_\_\_\_\_ **email** \_\_\_\_\_**Marital Status** \_\_\_\_\_ **# Dependents** \_\_\_\_\_ **ages** \_\_\_\_\_ **will someone else be on loan, who?** \_\_\_\_\_**Current Address** \_\_\_\_\_**County** \_\_\_\_\_ **How long** \_\_\_\_\_ **Rent/own\$** \_\_\_\_\_ **> 30 day late in past 12 mos** \_\_\_\_\_**Who do you rent from? Can we verify no lates in past 12 mos from non-related person** \_\_\_\_\_**LL Information** \_\_\_\_\_**Pr addrs dates** \_\_\_\_\_**IF CURRENT HOME OWNER** are you selling before closing or? \_\_\_\_\_ **Asking Price \$** \_\_\_\_\_

if renting how much will it rent for \$ \_\_\_\_\_ do you have a tenant ? \_\_\_\_\_

**Employer** \_\_\_\_\_ **how long** \_\_\_\_\_**Position/Title** \_\_\_\_\_ **Are you paid by the hour** \_\_\_\_\_ **Hr Rate \$** \_\_\_\_\_**#of hours per week you work** \_\_\_\_\_ **if not how paid** \_\_\_\_\_**Address:** \_\_\_\_\_**Work #** \_\_\_\_\_ **last yrs W-2 amt \$** \_\_\_\_\_ **prior Yr \$** \_\_\_\_\_**Income Notes** \_\_\_\_\_**Do you/your family own the company you work for?** \_\_\_\_\_ **Are you paid through a temp agency?** \_\_\_\_\_**PREVIOUS Employer/other income** \_\_\_\_\_ **how long** \_\_\_\_\_**Dates worked there** \_\_\_\_\_ **any gaps >30 days** \_\_\_\_\_**Position/Title** \_\_\_\_\_ **Pay** \_\_\_\_\_ **Work #** \_\_\_\_\_**Address:** \_\_\_\_\_**PREVIOUS Employer** \_\_\_\_\_ **how long** \_\_\_\_\_**Dates worked there** \_\_\_\_\_ **any gaps >30 days** \_\_\_\_\_**Position/Title** \_\_\_\_\_ **Pay** \_\_\_\_\_ **Work #** \_\_\_\_\_**Address:** \_\_\_\_\_**Do you get any other type of income? Child support etc?** \_\_\_\_\_**Documentation you can provide 1st 3 mos** \_\_\_\_\_**Do you owe any child support or alimony to anyone,** **Y** **N** **mos \$** \_\_\_\_\_ **Notes** \_\_\_\_\_**Notes**

### PURCHASE

How much do you plan to spend total for down payment, pre-pays and closing costs? \$ \_\_\_\_\_

How much of a total house payment do you feel like you can afford? \$ \_\_\_\_\_

What price range are you looking in \$ \_\_\_\_\_ Home type SFR, Mobile, Condo, log \_\_\_\_\_

Have you owned any home in the past 3 years \_\_\_\_\_ do you have a house picked out yet? \_\_\_\_\_ HOA dues \$ \_\_\_\_\_

Address \_\_\_\_\_

**Your total liquid asset you have, not what you want to spend, more helps us get you approved for the best loan we can.**

Bank Acct/type \_\_\_\_\_ \$ \_\_\_\_\_ been there \_\_\_\_\_ days

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Gifts from who \_\_\_\_\_ \$ \_\_\_\_\_ relation \_\_\_\_\_

Retirement \_\_\_\_\_ \$ \_\_\_\_\_ Type \_\_\_\_\_

CD/s, Stocks, Mutual Funds \_\_\_\_\_ \$ \_\_\_\_\_ Type \_\_\_\_\_

### REFINANCE

Year purchased \_\_\_\_\_ price you paid \$ \_\_\_\_\_ approx. current value \$ \_\_\_\_\_

Current owed \$ \_\_\_\_\_ refi purpose \_\_\_\_\_ current rate \_\_\_\_\_ %

Current payment \$ \_\_\_\_\_ T & I included \_\_\_\_\_ annual Taxes \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_ HOI Agent name # contact information \_\_\_\_\_

Total liquid assets \$ and place \_\_\_\_\_

### EVERYONE

**Are you:** Veteran \_\_\_\_\_ Native American \_\_\_\_\_ US Citizen \_\_\_\_\_ party to a lawsuit \_\_\_\_\_ delinquent on federal debt \_\_\_\_\_

**Do you:** owe IRS money \_\_\_\_\_ have any new debt that does not show on your credit report yet \_\_\_\_\_

Have a BK/Foreclosure in the past 7 years \_\_\_\_\_ if yes when and which \_\_\_\_\_

Plan on borrowing any other money from anyone before closing, who? \_\_\_\_\_ (do not recommend this)

**Do you currently own any other real estate anywhere?** \_\_\_\_\_ **if yes complete page 3 of questionnaire**

**If applicable:** Green Card \_\_\_\_\_ National Roll Card \_\_\_\_\_ used VA loan before \_\_\_\_\_

RD LN anyone else live with you who works? \_\_\_\_\_ name, income \_\_\_\_\_

**COMMUNITY PROPERTY STATE- IF MARRIED** need spouses full name DOB SS# and their permission to pull credit

Name \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_

Same address as borrower or \_\_\_\_\_ permission to pull credit \_\_\_\_\_

File Notes, such as LTV < 80% does borrower want escrows \_\_\_\_\_

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**Taken by** \_\_\_\_\_ **SW** \_\_\_\_\_ phone \_\_\_\_\_ in person Preliminary SP\$ \_\_\_\_\_

Loan type \_\_\_\_\_ Term \_\_\_\_\_ Estimated rate \_\_\_\_\_ % entered into encompass by \_\_\_\_\_

\*\*\* Be sure to scan and put in encompass.