Questionnaire edited 4-21-23 Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *Referred by(realtor): With: Phone: Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* Borr Name Contact @\_

Is it just going to be yourself on the loan or someone else, who? Approx. Credit Score?

**Borr Name** (Like on SS Card & DL)

Do you want to include middle initial?\_\_\_\_\_\_ M\_\_\_\_ F\_\_\_\_

Cell B Hm # Email

## SSN \_ DOB

Current Address

County live in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_OK to pull credit\_\_\_\_

Rent / Own How long? Rent/Mtg$ > 30 days late past 12 months?

Previous address if < 2 years? Dates Rent or own? **If own what are you doing with current home?** \_New home primary?

**►►►Do you CURRENTLY own any additional Real Estate? Y\_ \_N IF YES, COMPLETE PAGE 3, get now.**

## Marital Status Years of school

# of dependents

Ages

*\*\*\*Verify the Co-Borrower has same address. If not, take a separate application for each person. CB Title only Y \_N*

**CB Name** (Like on SS Card & DL)

Do you want to include middle initial? **M F**

Cell B Email SSN DOB Marital Status\_\_\_\_Years of School\_\_\_\_# of Dependents\_\_\_\_\_\_ *Ages \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*OK to pull credit\_\_\_\_\_

# B Mo Income $

## Employer Wrk # HR#

Years Yrs Similar typ industry

**CO-B Mo Income $**

*Employer CB Wrk # HR# \_ Years Yrs Similar typ industry \_*

$ Hour # hours a week

*$ Hour*

*# hours a week*

Exactly how paid?

*Exactly how paid?*

Position \_Bonus?

*Position*

*Bonus?*

Commission? expln:

*Commission?*

*expln:*

Address: \_ \_

Address:

*Previous Employer*

*Previous Employer:*

*Adrs Dates wrk: Yr Sal $*

*Gaps? Position:*

Adrs

*Dates wrk \_Yr Sal $ Gaps? Position: \_*

**Last year’s W-2s for B$ CB$**

**Are you self-employed or do you own *a %* of your company?**

**Does any family member own the company you work for? Y N (If yes, request 2 full years federal tax returns.)**

**\_\_**

**\_\_**

*Previous Employer*

*Previous Employer:*

*Dates wrk Yr Sal $*

*Dates wrk*

*Yr Sal $ \_*

Gaps? Position

Gaps?

Position

**Are you paid through a temp agency? Y\_ N** Construction, truck drivers, CPA, House Cleaners, etc. Ask if they’re paid with a W-2 or 1099 and if they are commission or piece work. **Do you have any other source of income**? Y N

$ source \_ **If Child Supp kids DOB** How can you document most recent 3 months? \_ \_

# PURCHASE total PITI you can afford $ Total liquid assets you have $

\*\*\*Total amount you want to put down $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_$ Been last 60 days? Bank Name: $ Type Bank Name: $ Type

It makes your file stronger if we show more assets; do you have any retirement accounts, 401K’s? Investment funds or access to any assets we do not already have listed. Retirement, Stocks, bonds, CD’s, mutual funds? List $Amt & type \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assets such as automobiles, boats, 4 wheelers, motorcycles, RV, jet skis, etc. list asset and value \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***House picked out? Price $ Is prop Mobile SFR or***

***Address***

**Are any borrowers obligated to pay alimony or child support? Y N** $ **per month Time left If RD loan total income of everyone living in home $ Are you a veteran Y N** What Branch Discharge date If yes, used VA loan before? Y N If yes, is it paid off now? Y N Pd in Full VA Monthly Child Care Costs**? $**

**\_\_\_**

**\_\_\_**

**\_\_**

**\_\_**

\_\_\_

\_\_\_

\_\_\_

\_\_\_

\_\_\_

\_\_\_

**Are you Native American? Y N Tribe**

**\_\_\_**

**\_\_\_**

Do you have a Native American National Roll Card? Y N

Past 7 years have you ever had a bankruptcy, foreclosure, or are you currently delinquent on any federal debt?

B CB If yes, explain Are you a party to a lawsuit? B CB Any outstanding judgments? B CB Are you a

U.S Citizen? B CB IF NOT Green Card B Y \_\_\_\_\_\_N CB Y\_\_\_\_\_\_\_\_\_ N

Race? B CB Borrowing Money from anywhere else for this RE Transaction\_\_\_\_\_\_\_\_Applying for any other mortgage loan on this or any other property on or before closing this loan Are you in any way related to or have a business affiliation with the seller? Do you owe the IRS $? Have you acquired any new monthly debt that will not show up on your credit report, example, new loans, IRS lien?

HOA Dues/Subject prop$ Owned other property in last 3 yrs? B CB **IF YES, COMPLETE PAGE 3**

***REFI AND IF own home, Selling prior to closing? \_ Selling after closing? Renting before closing?***

***\_ Rents you will receive? APPROX Value of HOME $ Amt Owed $ \_ Are taxes and insurance incl in payment? What are current Taxes*** *$* ***Insurance $*** *Year Acquired Original Cost $ \_ Refi Purpose \_ Improvements made \_* \_ \_ Current Rate % **Do you want your taxes & Insurance in your monthly payment?(only on conventional 20% or more down do you have a choice) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** File Notes:

LN Type\_ Term: Estimated Rate: \_ \_% Est Ln Amt/Sales Price $ \_

**Taken by: Spoke with:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** Entered Encompass by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ **PLEASE SCAN & PUT IN ENCOMPASS DO NOT TAKE PHOTO you can scan on any phone use notes button, look in** [**www.learnmortgagesense.com**](http://www.learnmortgagesense.com) **for instructions**

Phone In Person Form Edited on 4-21-23