DATE: _____ TIME: _____ LOAN OFFICER: _____

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

PRIMARY BORROWER: _____ DOB: _____ SSN: _____

PHONE (H): _____ PHONE (W): _____ PHONE (C): _____

CO-BORROWER: _____ DOB: _____ 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: 0.00% 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:

_____

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