

DATE: _____ TIME: _____ LOAN OFFICER: _____

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

PRIMARY BORROWER: _____ DOB: ____/____/19____ SSN: _____-____-_____

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

CO-BORROWER: _____ DOB: ____/____/19____ 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: _____ 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:**
