Borrower 1:_____
SS#:_____
Birthdate:_____
Phone H:_____
Phone W:_____
Phone C:_____

Borrower 1:_____
SS#:_____
Birthdate:_____
Phone H:_____
Phone W:_____
Phone C:_____

Property Address:_____
Current Address:_____

Borrower 1
Job
Self Emplyd

Pay:

_____
Hour
Weekly
Biweekly
Monthly

Other Income:

_____
Hour
Weekly
Biweekly
Monthly

Source:

_____
Time @ Job***:***
_____

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Borrower 1
Job
Self Emplyd

Pay:

_____
Hour
Weekly
Biweekly
Monthly

Other Income:

_____
Hour
Weekly
Biweekly
Monthly

Source:

_____
Time @ Job***:***
_____

Purchase

First Time Buyer
Ever owned a home. Yes / No
If Yes was it >3yrs ago? Yes / No

Upsizing/Downsizing
Need to sell current house? Yes / No
Using funds from sale? Yes / No
Estimated Proceeds from sale of home:
$_____
Estimated Close Date: _____

Refinance
Rate & Term
Cash-Out

Fixed
Adjustable
Interest Only
HELOC
Reverse Mortgage

Borrower History & Goals:
How Long to stay in house: #yrs_____
Ideal Payment for Borrower: $_____
Got a bankruptcy? Yes / No
Any Forclosure? Yes / No

Owner Occupied - O/O
Non- Owner Occupied – N/O/O
Second Home

Total Cash Available:_____

Reverse Mortgages:
Date of Birth: _____
Zip Code of House:_____
Current Mortgage Balance:_____

Agent Use
Anticipated %:_____
Price sensitive borrower: Yes / No

Notes:_____
_____
_____
_____
_____

Date Taken:_____
Loan Placer:_____
Processor:_____
Team Leader:_____

Loan Rep:_____
Date Options Presented:_____
Date Gave 2 Placer:_____