

Pre-Application Kit

Complete this form and provide the information requested on the Completed Application Checklist to expedite your approval process.

Borrower Information

Personal Information

Name: _____
Social Security Number: _____
Date of Birth: _____
Phone: _____
Current Address: _____
City: _____ State: _____ Zip: _____
Own: Rent: Years at Location: _____
If at this address for less than two years, please provide address and dates for a full two years.
Previous Address: _____
City: _____ State: _____ Zip: _____
Own: Rent: Years at Location: _____
Marital Status: _____ Single: Married: Separated:
Children's Ages: _____

Employment Information

Current Employer: _____
Title/Position: _____
Hire Date: _____
Work Phone Number: _____
Address: _____
City: _____ State: _____ Zip: _____
Years Employed: _____ Base Income: _____ /Year /Month /Hour Other Income: _____
If employed in current job for less than two years, please provide previous employers for a two year period.
Previous Employer: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Income: _____ Position/Title: _____
Dates Employed: _____ From: _____ To: _____

Co-Borrower Information

Personal Information

Name: _____
Social Security Number: _____
Date of Birth: _____
Phone: _____
Current Address: _____
City: _____ State: _____ Zip: _____
Own: Rent: Years at Location: _____
If at this address for less than two years, please provide address and dates for a full two years.
Previous Address: _____
City: _____ State: _____ Zip: _____
Own: Rent: Years at Location: _____
Marital Status: _____ Single: Married: Separated:
Children's Ages: _____

Employment Information

Current Employer: _____
Title/Position: _____
Hire Date: _____
Work Phone Number: _____
Address: _____
City: _____ State: _____ Zip: _____
Years Employed: _____ Base Income: _____ /Year /Month /Hour Other Income: _____
If employed in current job for less than two years, please provide previous employers for a two year period.
Previous Employer: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Income: _____ Position/Title: _____
Dates Employed: _____ From: _____ To: _____

Note: If you are commissioned, self-employed, or have any income, including rental income, which is variable in nature, you will be required to provide two years of Federal Tax Returns, and a year-to-date income and expense summary.

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Assets & Liabilities

This section of your application is designed to evaluate the sufficiency of your assets to consummate the transaction and the impact of other obligations on your ability to repay the loan for which you have applied.

Assets

Bank Accounts <i>(Checking, NOW)</i>		
Institution	Account Number	Balance
Savings Accounts <i>(Statement, CD, Money Market)</i>		
Institution	Account Number	Balance
Stocks & Bonds		
Security or Broker	Number of Shares/Account Number	Value
Life Insurance		
Face Amount:	Value:	
Reirement <i>(401k, IRA, CSA, etc.):</i>		

Liabilities

List all Loans, Charge Accounts, Revolving Debts, Credit Cards, and Installment Loans.

Institution	Account Number	Balance Payment
Real Estate Loans		
Institution	Account Number	Balance Payment
Landlord <i>(For Past 12 Months)</i>		
Name:		
Address:		
City:	State:	Zip:
Phone:	Rent Amount:	

Real Estate Schedule *(Attach separate schedule if more appropriate)*

Property Address	Sold/Rent	Property Type	Market Value	Mortgage Balance	Rental Income	Taxes & Insurance
List Year, Make & Value of Automobiles:						
List Other Property:						



Questions? Contact one of our Mortgage professionals today!

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