

	<b>Todays Date</b>		
	<b>Advertising Source</b>		
		Borrower	Co-Borrower
GENERAL	<b>NAME</b>		
	<b>Marrital Status, # of Dependants</b>		
	<b>Current Address</b>		
	City, State and Zip		
	Own or Rent		
	How Long		
	Home Phone		
	Fax Number		
	Email Address		
	Date of Birth		
PROPERTY	<b>Subject Property Address</b>		
	City, State and Zip		
	How to Hold Title		
EMPLOYER	<b>Business Name</b>		
	Address		
	City, State and Zip		
	Position/Title		
	Years on Job		
	Years in line of work		
	Business Phone		
CLIENT NEEDS	<b>Purpose/Goal</b>		
	How long going to live there?		
	What are your Expectations		
	<b>Purchase</b>		
	Monthly Rent?		
	How much for Down Payment?		
	Source of funds?		
	How seasoned are funds?		
Payment and loan desired?			
CURRENT (refi only)	<b>First Mortgage Balance</b>		
	% Interest Rate		
	Fixed or Adjustable?		
	Original Term		
	Term left		
	Balloon?		
	Payment (P&I)		
	Tax & Ins. Payment (T & I)		
	If needed, (PMI)		
	<b>Second Mortgage Balance</b>		
	% Interest Rate		
	Payment (P&I)		
	Original Term & (type)		
	Term left?		
	<b>Pre-Payment Penalty on 1st?</b>		
<b>Pre-Payment Penalty on 2nd?</b>			
HOUSE INFO	<b>Approx. Home Value?</b>		Comp value:
	<b>Property Type</b>		Comp type:

CREDIT	<b>FICO Borrower/Rating (1-10)</b>	SSN:	
	TransUnion		
	EquiFax		
	Experian		
	<b>FICO Co-Borrower/Rating (1-10)</b>	SSN:	
	TransUnion		
	EquiFax		
	Experian		
	<b>Credit Card Lates?</b>		
	number of 30 day lates		
	number of 60 day lates		
	number of 90 day lates		
	<b>Mortgage Lates?</b>		
<b>Foreclosures?</b>			
<b>Bankruptcies? (How long Ago?)</b>			

(ASSETS) If Needed	Automobiles		
	Stocks/Mutual Fund/Annuity		
	401K/Pension		
	Life Insurance with Cash Value		
	Savings/Bonds		
	<b>Estimated Total Value</b>		

Wrap Up			
INCOME	<b>Self Employed</b>	Borrower	Co-Borrower
	Schedule C (\$P or \$L)		
	<b>W-2 Gross Monthly Earnings</b>		
	Overtime		
	Bonus/Other		
	Rental Income		
	<b>Total Monthly Income</b>		

DEBT	Car Loan	Current Value:	
	Student Loan		
	Credit Card Min/Payments	per month	balance
	Personal Loan	per month	balance
	Home Owner's Assoc.	per month	balance
	Total Other	per month	balance
	(any less than 10?)	per month	balance
	<b>Total Gross Debt</b>	per month	balance

Misc.	HOA Name and Address		
	Do you want an Impound Act.?		
	Applied Elsewhere? (escrow)		
	Liable for Alimony or Child Support?		
	Own other Properties? (liability)		
	Rental Agreements & Prop types		
	Judgements, Liens, Taxes, Supplemental Taxes or Charge Offs?:		
	If so, Include in loan amount?		

LTV \_\_\_\_\_ CLTV \_\_\_\_\_ PURCHASE AMOUNT QUALIFIED FOR \_\_\_\_\_

FRONT END \_\_\_\_\_ RENT SHOCK \_\_\_\_\_

BACK END \_\_\_\_\_ QUOTES & NOTES: \_\_\_\_\_