

RESIDENTIAL MORTGAGE DATA ANALYSIS

BORROWER NAME _____	DATE OF BIRTH _____	CO-BORROWER NAME _____	DATE OF BIRTH _____
BORROWER SOCIAL SEC# _____ - _____ - _____	BIRTH _____	CO-BORROWER SOCIAL SEC# _____ - _____ - _____	BIRTH _____
BORROWER EMAIL ADDRESS _____		CO-BORROWER EMAIL ADDRESS _____	
BORROWER PHONE NUMBERS (CELL) _____ (HOME) _____		CO-BORROWER PHONE NUMBERS (CELL) _____ (HOME) _____	
BORROWER CURRENT ADDRESS _____		(IF DIFFERENT FROM BORR)CO-BORROWER CURRENT ADDRESS _____	
CITY, STATE & ZIP _____		CITY, STATE & ZIP _____	
TIME AT CURRENT ADDRESS: _____ OWN _____ RENT _____		TIME AT CURRENT ADDRESS: _____ OWN _____ RENT _____	
IF LESS THAN 2 YEARS AT CURRENT ADDRESS		IF LESS THAN 2 YEARS AT CURRENT ADDRESS	
PREVIOUS ADDRESS _____		PREVIOUS ADDRESS _____	
CITY, STATE & ZIP _____		CITY, STATE & ZIP _____	
TIME AT PREV ADDRESS: _____ OWN _____ RENT _____		TIME AT PREV ADDRESS: _____ OWN _____ RENT _____	
IF CURRENTLY RENTING, PLEASE PROVIDE NAME, ADDRESS & PHONE#		OF LANDLORD _____	HOW MUCH IS YOUR RENT PMT \$ _____/MO
ARE YOU MARRIED? YES _____ NO _____	DO YOU HAVE CHILDREN? YES _____ NO _____	IF YES, HOW MANY AND AGES _____	
BORROWER ARE YOU A US CITIZEN? YES _____ NO _____		CO-BORROWER ARE YOU A US CITIZEN? YES _____ NO _____	

EMPLOYMENT AND INCOME HISTORY

HOW ARE YOU PAID? (PLEASE CHECK APPROPRIATE BOX - B=BORROWER C= CO-BORROWER)

B _____	B _____	B _____	HOW LONG IN THIS LINE OF WORK	B _____
W2 WAGES C _____	1099 CONTRACTED C _____	SELF EMPLOYED C _____		C _____
BORROWER'S EMPLOYER/DBA _____		CO-BORROWER'S EMPLOYER/DBA _____		
ADDRESS _____		ADDRESS _____		
CITY/ZIP _____	PHONE# _____	CITY/ZIP _____	PHONE# _____	
HOW LONG WITH THIS EMPLOYER _____	JOB TITLE _____	HOW LONG WITH THIS EMPLOYER _____	JOB TITLE _____	
GROSS INCOME \$ _____	MO HRLY YRLY	GROSS INCOME \$ _____	MO HRLY YRLY	
ANY ADDITIONAL INCOME? YES _____ NO _____	HOW MUCH MONTHLY \$ _____	ANY ADDITIONAL INCOME? YES _____ NO _____	HOW MUCH MONTHLY \$ _____	
SOURCE OF ADD INCOME? _____		SOURCE OF ADD INCOME? _____		
IF YOU HAVE BEEN WITH YOUR CURRENT EMPLOYER LESS THAN 2 YEARS, OR HAVE A 2ND JOB				
PREV/2 ND JOB EMPLOYMENT INFO		PREV/2 ND JOB EMPLOYMENT INFO		
EMPLOYER/DBA _____		EMPLOYER/DBA _____		
ADDRESS/ZIP _____		ADDRESS/ZIP _____		
PH # _____	START DATE _____	END DATE _____	PH # _____	START DATE _____
ANNUAL INCOME \$ _____	JOB TITLE _____	ANNUAL INCOMES \$ _____	JOB TITLE _____	

THIS PROPERTY WILL BE/IS YOUR:	PRIMARY RESIDENCE _____	2 ND HOME _____	INVESTMENT PROPERTY _____	
THIS PROPERTY WILL BE/IS A:	SFR _____	CONDO _____	TOWNHOME _____	PATIO HOME _____
IF THERE IS AN HOA		ARE THEY		MODULAR _____
WHAT ARE THE HOA DUES AMOUNT \$ _____		PAID _____	MONTHLY _____	QUARTERLY _____
IF PROPERTY IS A RENTAL				YEARLY _____
HOW MUCH IS COLLECTED IN RENT MONTHLY \$ _____				
HOME OWNER'S INSURANCE INFORMATION. WE MUST HAVE THIS INFORMATION FOR ALL BORROWERS PRIOR TO APPLICATION				
HOME OWNER'S INSURANCE CO NAME _____		NAME AND PHONE # OF INSURANCE AGENT _____		

IF REFINANCING - INFORMATION ABOUT SUBJECT PROPERTY

SUBJECT PROPERTY ADDRESS _____	CITY/STATE/ZIP: _____
WHAT IS THE SUBJECT PROPERTY'S CURRENT VALUE? \$ _____	YEARLY TAXES \$ _____
WHO HOLDS YOUR 1 ST MORTGAGE _____	DO YOU HAVE A 2 ND OR HELOC? YES _____ NO _____
BALANCE: \$ _____	TERM _____
MO PMT \$ _____	
INTEREST RATE _____	% FIXED _____
VARIABLE _____	
ARE PMTS ESCROWED? YES _____ NO _____	ANY LATE MTG PMTS IN LAST 24 MO? YES _____ NO _____
	IF YES, WHEN WAS THE LAST LATE PAYMENT? _____

ASSETS

DO YOU OWN ANY OTHER REAL ESTATE? YES _____ NO _____	IF YES, PLEASE PROVIDE US A SCHEDULE OF REAL ESTATE OWNED. WE HAVE A FORM, JUST ASK FOR ONE AND IT WILL BE SENT.
WHO DO YOU BANK WITH? _____	CHECKING BALANCE \$ _____
	SAVINGS BALANCE \$ _____
	BALANCE OF 401K/IRA \$ _____
IN THE LAST 7 YEARS HAVE YOU HAD A	BANKRUPTCY _____
	FORECLOSURE _____
	SHORTSALE _____
	NONE _____
IF YES, WAS BK	CHAPTER 7 _____
	CHAPTER 13 _____
DATE OF FORECLOSURE OR SHORTSALE _____	WHEN DISCHARGED? _____
IF PURCHASING	ARE YOU VA ELIGIBLE? YES _____ NO _____
SOURCE OF DOWNPAYMENT: CHECKING/SAVINGS _____	IF YES, WILL THIS BE YOUR 1 ST VA LOAN? YES _____ NO _____
	GIFT _____
	ASSETS/ RETIREMENT _____
	EQUITY FROM SALE OF CURRENT PROPERTY _____