

Date _____ Source _____ Joint _____ Individual _____

Borrower Name _____ SSN _____ - _____ - _____

Home Phone # _____ - _____ - _____ DOB _____ - _____ - _____ Township _____

Address _____

County _____ #yrs at address _____ Purchase price \$ _____ Date _____

Employer _____ Position _____

of yrs at work _____ # of yrs in prof _____ Bus. Phone # _____

Employer's address _____

Estimated Income _____ Other Income _____

Previous Employment Info _____

CoBorrower Name _____ SSN _____ - _____ - _____

DOB _____ - _____ - _____ Title held jointly _____ Married _____ Dependents & ages _____

Employer _____ Position _____

of yrs at work _____ # of yrs in prof _____ Bus. Phone # _____

Employer's address _____

Estimated Income _____ Other Income _____

Previous Employment Info _____

Mortgages	Balance	Payment	Rate	Term
1 st	_____	_____	_____	_____
2 nd	_____	_____	_____	_____

Escrowed? _____ Annual prop taxes _____ Home Owners _____

Have you been late on your mortgage? _____ How many times in 12 months? _____

Have you ever filed bankruptcy? _____ Type _____ Discharge date _____

Are there any outstanding liens, judgements or back taxes? _____ Amount _____

Do you have outstanding credit card balances to consolidate? _____ Amount _____

Do you want cash out? _____ Amount _____ Purpose _____

What is your main objective you wish to accomplish by refinancing _____

Best time to reach you _____ Comments _____

Savings Account Balance _____ Name of Bank _____

Checking Account Balance _____ Name of Bank _____

Investment Bonds/ CD's \$ _____

Investment Stocks \$ _____

401K plans \$ _____

Life Insurance Policies –cash value \$ _____

Other liquid Assets \$ _____

Automobiles 1 _____ 2 _____
Year-make model & value estimation

THE HOUSE

Information about your home: Style (ranch, two-story, split) _____

Exterior Siding (brick, vinyl, aluminum) _____ Age _____

Property type: (rural, suburban, urban) _____

Number of rooms above grade _____ Bedrooms _____ Bathrooms _____

Living room _____ Family room _____ Dining room _____ Kitchen _____

Fireplaces _____ Finished basement _____ Foundation type _____

Finished attic? _____ Lot size _____ Fenced yard? _____

Heat fuel (gas, oil, elec) _____ Forced air, hot water, radiant? _____

Utilities: All public _____ Well _____ Septic _____ Other _____

C/A? _____ Garage (integral, attached, detached) _____ # car(s) _____

Porches (style, size, covered?) _____

Decks (size, front/rear, covered?) _____

Improvements (new roof, windows, kitchen, mechanics, etc...) _____

Date of last appraisal _____ Amt \$ _____

Estimated fair market value _____