

# MORTGAGE LOAN APPLICATION WORK SHEET

## To Be Completed In Detail

### BORROWER INFORMATION

#### BORROWER

NAME \_\_\_\_\_  
SOC SEC NO. \_\_\_\_\_  
BIRTH DATE \_\_\_\_\_  
MARRIED \_\_\_\_\_ UNMARRIED \_\_\_\_\_ SEPARATED \_\_\_\_\_  
DEPENDENTS \_\_\_\_\_ AGES \_\_\_\_\_  
CURRENT HOME PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

#### CO-BORROWER

NAME \_\_\_\_\_  
SOC SEC NO. \_\_\_\_\_  
BIRTH DATE \_\_\_\_\_  
MARRIED \_\_\_\_\_ UNMARRIED \_\_\_\_\_ SEPARATED \_\_\_\_\_  
DEPENDENTS \_\_\_\_\_ AGES \_\_\_\_\_  
CURRENT HOME PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

### RESIDENCY HISTORY

**CURRENT HOME ADDRESS** DATES: MO/YR FROM: \_\_\_\_\_ TO: \_\_\_\_\_  
STREET \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
RENT \_\_\_\_\_ OWN \_\_\_\_\_  
RENT/MORTGAGE PAYMENT \_\_\_\_\_/MO  
**LANDLORD/MORTGAGE CO.**  
NAME \_\_\_\_\_ PHONE# (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
ACCOUNT # \_\_\_\_\_  
HOME VALUE (EST) \$ \_\_\_\_\_  
MORTGAGE BALANCE \$ \_\_\_\_\_

**CURRENT HOME ADDRESS** DATES: MO/YR FROM: \_\_\_\_\_ TO: \_\_\_\_\_  
STREET \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
RENT \_\_\_\_\_ OWN \_\_\_\_\_  
RENT/MORTGAGE PAYMENT \_\_\_\_\_/MO  
**LANDLORD/MORTGAGE CO.**  
NAME \_\_\_\_\_ PHONE# (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
ACCOUNT # \_\_\_\_\_  
HOME VALUE (EST) \$ \_\_\_\_\_  
MORTGAGE BALANCE \$ \_\_\_\_\_

### IF RESIDING LESS THAN 3 YEARS AT ABOVE ADDRESS, COMPLETE THE FOLLOWING

**PREVIOUS ADDRESS** DATES: MO/YR FROM: \_\_\_\_\_ TO: \_\_\_\_\_  
STREET \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
RENT \_\_\_\_\_ OWN \_\_\_\_\_  
RENT/MORTGAGE PAYMENT \_\_\_\_\_/MO  
**LANDLORD/MORTGAGE CO.**  
NAME \_\_\_\_\_ PHONE# (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
ADDRESS \_\_\_\_\_

**PREVIOUS ADDRESS** DATES: MO/YR FROM: \_\_\_\_\_ TO: \_\_\_\_\_  
STREET \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
RENT \_\_\_\_\_ OWN \_\_\_\_\_  
RENT/MORTGAGE PAYMENT \_\_\_\_\_/MO  
**LANDLORD/MORTGAGE CO.**  
NAME \_\_\_\_\_ PHONE# (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
ADDRESS \_\_\_\_\_

### IF RESIDING LESS THAN 3 YEARS AT ABOVE ADDRESS, COMPLETE THE FOLLOWING

**PREVIOUS ADDRESS** DATES: MO/YR FROM: \_\_\_\_\_ TO: \_\_\_\_\_  
STREET \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
RENT \_\_\_\_\_ OWN \_\_\_\_\_  
RENT/MORTGAGE PAYMENT \_\_\_\_\_/MO  
**LANDLORD/MORTGAGE CO.**  
NAME \_\_\_\_\_ PHONE# (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
ADDRESS \_\_\_\_\_

**PREVIOUS ADDRESS** DATES: MO/YR FROM: \_\_\_\_\_ TO: \_\_\_\_\_  
STREET \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
RENT \_\_\_\_\_ OWN \_\_\_\_\_  
RENT/MORTGAGE PAYMENT \_\_\_\_\_/MO  
**LANDLORD/MORTGAGE CO.**  
NAME \_\_\_\_\_ PHONE# (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
ADDRESS \_\_\_\_\_

**EMPLOYMENT HISTORY**

**CURRENT EMPLOYMENT**

BORROWERS EMPLOYER    SELF-EMPLOYED    YES \_\_\_\_ NO \_\_\_\_

NAME \_\_\_\_\_

STREET \_\_\_\_\_

City/State/Zip \_\_\_\_\_

PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

POSITION \_\_\_\_\_

DATES EMPLOYED (MO/YR)                  FROM \_\_\_\_\_ TO \_\_\_\_\_

GROSS SALARY                  \$ \_\_\_\_\_                  ANNUAL \_\_\_\_\_  
   MONTHLY \_\_\_\_\_  
   WEEKLY \_\_\_\_\_

COMMISSION/BONUS                  \$ \_\_\_\_\_

OTHER INCOME                  \$ \_\_\_\_\_

**CURRENT EMPLOYMENT**

CO-BORROWERS EMPLOYER    SELF-EMPLOYED    YES \_\_\_\_ NO \_\_\_\_

NAME \_\_\_\_\_

STREET \_\_\_\_\_

City/State/Zip \_\_\_\_\_

PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

POSITION \_\_\_\_\_

DATES EMPLOYED (MO/YR)                  FROM \_\_\_\_\_ TO \_\_\_\_\_

GROSS SALARY                  \$ \_\_\_\_\_                  ANNUAL \_\_\_\_\_  
   MONTHLY \_\_\_\_\_  
   WEEKLY \_\_\_\_\_

COMMISSION/BONUS                  \$ \_\_\_\_\_

OTHER INCOME                  \$ \_\_\_\_\_

**IF EMPLOYED IN CURRENT JOB FOR LESS THAN 3 YEARS, COMPLETE THE FOLLOWING**

**PREVIOUS EMPLOYMENT**

BORROWERS EMPLOYER    SELF-EMPLOYED    YES \_\_\_\_ NO \_\_\_\_

NAME \_\_\_\_\_

STREET \_\_\_\_\_

City/State/Zip \_\_\_\_\_

PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

POSITION \_\_\_\_\_

DATES EMPLOYED (MO/YR)                  FROM \_\_\_\_\_ TO \_\_\_\_\_

GROSS SALARY                  \$ \_\_\_\_\_                  ANNUAL \_\_\_\_\_  
   MONTHLY \_\_\_\_\_  
   WEEKLY \_\_\_\_\_

COMMISSION/BONUS                  \$ \_\_\_\_\_

OTHER INCOME                  \$ \_\_\_\_\_

**PREVIOUS EMPLOYMENT**

CO-BORROWERS EMPLOYER    SELF-EMPLOYED    YES \_\_\_\_ NO \_\_\_\_

NAME \_\_\_\_\_

STREET \_\_\_\_\_

City/State/Zip \_\_\_\_\_

PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

POSITION \_\_\_\_\_

DATES EMPLOYED (MO/YR)                  FROM \_\_\_\_\_ TO \_\_\_\_\_

GROSS SALARY                  \$ \_\_\_\_\_                  ANNUAL \_\_\_\_\_  
   MONTHLY \_\_\_\_\_  
   WEEKLY \_\_\_\_\_

COMMISSION/BONUS                  \$ \_\_\_\_\_

OTHER INCOME                  \$ \_\_\_\_\_

**IF EMPLOYED IN ABOVE JOB FOR LESS THAN 3 YEARS, COMPLETE THE FOLLOWING**

**PREVIOUS EMPLOYMENT**

BORROWERS EMPLOYER    SELF-EMPLOYED    YES \_\_\_\_ NO \_\_\_\_

NAME \_\_\_\_\_

STREET \_\_\_\_\_

City/State/Zip \_\_\_\_\_

PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

POSITION \_\_\_\_\_

DATES EMPLOYED (MO/YR)                  FROM \_\_\_\_\_ TO \_\_\_\_\_

GROSS SALARY                  \$ \_\_\_\_\_                  ANNUAL \_\_\_\_\_  
   MONTHLY \_\_\_\_\_  
   WEEKLY \_\_\_\_\_

COMMISSION/BONUS                  \$ \_\_\_\_\_

OTHER INCOME                  \$ \_\_\_\_\_

**PREVIOUS EMPLOYMENT**

CO-BORROWERS EMPLOYER    SELF-EMPLOYED    YES \_\_\_\_ NO \_\_\_\_

NAME \_\_\_\_\_

STREET \_\_\_\_\_

City/State/Zip \_\_\_\_\_

PHONE (INC AREA CODE) (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

POSITION \_\_\_\_\_

DATES EMPLOYED (MO/YR)                  FROM \_\_\_\_\_ TO \_\_\_\_\_

GROSS SALARY                  \$ \_\_\_\_\_                  ANNUAL \_\_\_\_\_  
   MONTHLY \_\_\_\_\_  
   WEEKLY \_\_\_\_\_

COMMISSION/BONUS                  \$ \_\_\_\_\_

OTHER INCOME                  \$ \_\_\_\_\_

## ASSETS

### BANK: NAME AND ADDRESS

NAME \_\_\_\_\_  
 STREET \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_

### ACCOUNT NUMBERS:

CHECKING \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 SAVINGS \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 CD \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 MONEY MARKET \_\_\_\_\_ BAL \$ \_\_\_\_\_

### BANK: NAME AND ADDRESS

NAME \_\_\_\_\_  
 STREET \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_

### ACCOUNT NUMBERS:

CHECKING \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 SAVINGS \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 CD \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 MONEY MARKET \_\_\_\_\_ BAL \$ \_\_\_\_\_

### BANK: NAME AND ADDRESS

NAME \_\_\_\_\_  
 STREET \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_

### ACCOUNT NUMBERS:

CHECKING \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 SAVINGS \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 CD \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 MONEY MARKET \_\_\_\_\_ BAL \$ \_\_\_\_\_

### BANK: NAME AND ADDRESS

NAME \_\_\_\_\_  
 STREET \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_

### ACCOUNT NUMBERS:

CHECKING \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 SAVINGS \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 CD \_\_\_\_\_ BAL \$ \_\_\_\_\_  
 MONEY MARKET \_\_\_\_\_ BAL \$ \_\_\_\_\_

## OTHER ASSETS

STOCKS \$ \_\_\_\_\_  
 IRA'S \$ \_\_\_\_\_  
 RETIREMENT(401K) \$ \_\_\_\_\_  
 LIFE INSURANCE (CASH VALUE) \$ \_\_\_\_\_  
 AUTOMOBILES (YR,MAKE,MODEL,VALUE) \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

PERSONAL PROPERTY (FURNITURE, ETC.)

### OTHER REAL ESTATE OWNED

TYPE	VALUE	BALANCE	PAYMT/MO	RENT/MO
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____

STOCKS \$ \_\_\_\_\_  
 IRA'S \$ \_\_\_\_\_  
 RETIREMENT(401K) \$ \_\_\_\_\_  
 LIFE INSURANCE (CASH VALUE) \$ \_\_\_\_\_  
 AUTOMOBILES (YR,MAKE,MODEL,VALUE) \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_  
 \_\_\_\_\_ \$ \_\_\_\_\_

PERSONAL PROPERTY (FURNITURE, ETC.)

### OTHER REAL ESTATE OWNED

TYPE	VALUE	BALANCE	PAYMT/MO	RENT/MO
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____	\$ _____

TYPE: SFR – SINGLE FAMILY RESIDENTIAL  
 DPLX –DUPLICATE  
 CONDO  
 TWNHM – TOWN HOME

\*\* ON OTHER ASSETS PLEASE INCLUDE MOST RECENT 3 MONTHS OR

**LIABILITIES**

**BORROWER**

**CO-BORROWER**

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

CREDITOR \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

PAYMT/MO \_\_\_\_\_ BAL \$ \_\_\_\_\_

If you answer "yes" to any question A--G, please use extra sheet for explanation.

- A. ARE THERE ANY OUTSTANDING JUDGEMENTS AGAINST YOU?
- B. HAVE YOU BEEN DECLARED BANKRUPT IN THE LAST 7 YEARS?
- C. HAVE YOU HAD PROPERTY FORECLOSED UPON OR GIVEN TITLE OR DEED IN LIEU THEREOF IN THE LAST 7 YEARS?
- D. ARE YOU PARTY TO A LAWSUIT?
- E. ARE YOU PRESENTLY DELINQUENT OR IN DEFAULT ON ANY FEDERAL DEBT OR ANY OTHER LOAN OR FINANCIAL OBLIGATION?
- F. ARE YOU OBLIGATED TO PAY ALIMONY, CHILD SUPPORT, OR SEPARATE MAINTENANCE?
- G. IS ANY PART OF THE DOWN PAYMENT BORROWED?
- H. ARE YOU a U.S. CITIZEN?
- I. ARE YOU A PERMANENT RESIDENT ALIEN?
- J. HAVE YOU HAD AN OWNERSHIP INTEREST IN A PROPERTY IN THE LAST THREE YEARS?

<u>BORROWER</u>		<u>CO-BORROWER</u>	
<u>YES</u>	<u>NO</u>	<u>YES</u>	<u>NO</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**BORROWER**

**CO-BORROWER**

RACE/NATIONAL ORIGIN:

American Indian, Alaskan Native \_\_\_\_\_ Asian, Pacific Islander \_\_\_\_\_

Black \_\_\_\_\_ Hispanic \_\_\_\_\_ White \_\_\_\_\_ Other \_\_\_\_\_

SEX: Female \_\_\_\_\_ Male \_\_\_\_\_

RACE/NATIONAL ORIGIN:

American Indian, Alaskan Native \_\_\_\_\_ Asian, Pacific Islander \_\_\_\_\_

Black \_\_\_\_\_ Hispanic \_\_\_\_\_ White \_\_\_\_\_ Other \_\_\_\_\_

SEX: Female \_\_\_\_\_ Male \_\_\_\_\_