

General Information Request Form

Borrower			BORROWER INFORMATION			Co-Borrower		
Borrower's Legal Name			Co-Borrower's Legal Name					
Borrower's Email Address:			Co-Borrower's Email Address:					
Cell Phone (incl. area code)	Home Phone (incl. area code)	Veteran Yes No	Cell Phone (incl. area code)	Home Phone (incl. area code)	Veteran Yes No			
<input type="checkbox"/> Married (includes registered domestic partners) <input type="checkbox"/> Unmarried (includes single, divorced, widowed) <input type="checkbox"/> Separated		Dependents (not listed by Co-Borrower) No. _____ Ages _____	<input type="checkbox"/> Married (includes registered domestic partners) <input type="checkbox"/> Unmarried (includes single, divorced, widowed) <input type="checkbox"/> Separated		Dependents (not listed by Borrower) No. _____ Ages _____			
Present Address (street, city, state, ZIP/ country) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.			Present Address (street, city, state, ZIP/ country) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.					
Mailing Address, if different from Present Address			Mailing Address, if different from Present Address					

If residing at present address for less than two years, complete the following:

Former Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.	Former Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.
Former Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.	Former Address (street, city, state, ZIP) <input type="checkbox"/> Own <input type="checkbox"/> Rent ___ No. Yrs.

PROPERTY INFORMATION AND PURPOSE OF LOAN

Subject Property Address:	If purchase loan, what price range are you looking to purchase in?
Source of Funds and Amount Available for Down Payment and/or Settlement Charges (Gift, Checking, 401K, Etc.):	
Purpose of Loan <input type="checkbox"/> Purchase <input type="checkbox"/> Construction <input type="checkbox"/> Other (explain): <input type="checkbox"/> Refinance <input type="checkbox"/> Construction-Permanent	Property will be: <input type="checkbox"/> Primary Residence <input type="checkbox"/> Secondary Residence <input type="checkbox"/> Investment

Complete this line if this is a refinance loan.

Year Acquired	Original Cost	Amount Existing Liens	Purpose of Refinance (Home Improvements, Debt Consolidation, Cash Out, Rate/Term, Etc.)
	\$	\$	

Borrower		IV. EMPLOYMENT INFORMATION		Co-Borrower	
Name & Address of Employer <input type="checkbox"/> Self Employed	Yrs. on this job	Name & Address of Employer <input type="checkbox"/> Self Employed	Yrs. on this job	Position/Title/Type of Business	Business Phone (incl. area code)
	Yrs. employed in this line of work/profession		Yrs. employed in this line of work/profession		
Position/Title/Type of Business		Business Phone (incl. area code)		Position/Title/Type of Business	
Business Phone (incl. area code)		Business Phone (incl. area code)			

If employed in current position for less than two years or if currently employed in more than one position, complete the following:

Name & Address of Employer <input type="checkbox"/> Self Employed	Dates (from-to)	Name & Address of Employer <input type="checkbox"/> Self Employed	Dates (from-to)
	Monthly Income \$		Monthly Income \$
Position/Title/Type of Business		Business Phone (incl. area code)	
Business Phone (incl. area code)		Business Phone (incl. area code)	

ASSETS		DECLARATIONS							
If Purchase		If you answer "Yes" to any questions a through i, please use continuation sheet for explanation.		Borrower		Co-Borrower			
Gift available from family member/relative? Yes No				Yes	No	Yes	No		
If Yes, Please list amount:		a. Are there any outstanding judgments against you?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
List checking and savings accounts below		b. Have you been declared bankrupt within the past 7 years?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Name and address of Bank, S&L, or Credit Union		c. Have you had property foreclosed upon or given title or deed in lieu thereof in the last 7 years?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
\$		d. Are you a party to a lawsuit?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Name and address of Bank, S&L, or Credit Union		e. Have you directly or indirectly been obligated on any loan which resulted in foreclosure, transfer of title in lieu of foreclosure, or judgment?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
\$		<small>(This would include such loans as home mortgage loans, SBA loans, home improvement loans, educational loans, manufactured (mobile) home loans, any mortgage, financial obligation, bond, or loan guarantee. If "Yes," provide details, including date, name, and address of Lender, FHA or VA case number, if any, and reasons for the action.)</small>		f. Are you presently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation, bond, or loan guarantee?		<input type="checkbox"/>	<input type="checkbox"/>		
Name and address of Bank, S&L, or Credit Union				If "Yes," give details as described in the preceding question.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
\$		g. Are you obligated to pay alimony, child support, or separate maintenance?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Name and address of Bank, S&L, or Credit Union		h. Is any part of the down payment borrowed?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
\$		i. Are you a co-maker or endorser on a note?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Name and address of Bank, S&L, or Credit Union		j. Are you a U. S. citizen?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
\$		k. Are you a permanent resident alien?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Stocks & Bonds (Company name/Value)		l. Do you intend to occupy the property as your primary residence?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
\$		If "Yes," complete question m below.		m. Have you had an ownership interest in a property in the last three years?		<input type="checkbox"/>	<input type="checkbox"/>		
Name and address of Bank, S&L, or Credit Union		<small>(1) What type of property did you own-principal residence (PR), second home (SH), or investment property (IP)?</small>		<small>(2) How did you hold title to the home-solely by yourself (S), jointly with your spouse (SP), or jointly with another person (O)?</small>					
\$									
Stocks & Bonds (Company name/Value)		MONTHLY INCOME		MONTHLY HOUSING					
Name and address of Bank, S&L, or Credit Union		Gross Monthly Income		Borrower		Co-Borrower			
		Base Empl. Income		\$		\$		Rent	
401K		Overtime						First Mortgage (P&I)	
		Bonuses						Other Financing (P&I)	
401K		Commissions						Hazard Insurance	
		Notice: Alimony, child support, or separate maintenance income need not be revealed if the Borrower (B) or Co-Borrower (C) does not choose to have it considered for repaying this loan.						Real Estate Taxes	
						Mortgage Insurance			
						Homeowner Assn. Dues			
401K		Other Income							
Other Assets		B/C						Monthly Amount	
								\$	
\$								\$	

Schedule of Real Estate Owned (if additional properties are owned, use additional sheet)

Property Address	Present Market Value	Amount of Mortgages & Liens	Mortgage Payments	Gross Rental Income	Maintenance, Taxes & Misc.
1.	\$	\$	\$	\$	\$
2.	\$	\$	\$	\$	\$

Additional info you would like us to know:

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