

## Personal Information

Name (First, Middle, Last, Suffix)

Social Security Number \_\_\_\_\_  
(or Individual Taxpayer Identification Number)

Date of Birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
(mm/dd/yyyy)

### Type of Credit

- I am applying for **individual credit**.
- I am applying for **joint credit**. Total Number of Borrowers: \_\_\_\_  
Each Borrower intends to apply for joint credit. Your initials: \_\_\_\_\_

### Marital Status

- Married  
 Separated  
 Unmarried  
(Single, Divorced, Widowed, Civil Union, Domestic Partnership, Registered Reciprocal Beneficiary Relationship)

### Current Address

Street \_\_\_\_\_ Unit # \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Country \_\_\_\_\_  
How Long at Current Address? \_\_\_\_ Years \_\_\_\_ Months Housing  No primary housing expense  Own  Rent (\$ \_\_\_\_\_ /month)

### If at Current Address for LESS than 2 years, list Former Address Does not apply

Street \_\_\_\_\_ Unit # \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Country \_\_\_\_\_  
How Long at Former Address? \_\_\_\_ Years \_\_\_\_ Months Housing  No primary housing expense  Own  Rent (\$ \_\_\_\_\_ /month)

### Mailing Address – if different from Current Address Does not apply

Street \_\_\_\_\_ Unit # \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Country \_\_\_\_\_

## Current Employment/Self-Employment and Income Does not apply

Employer or Business Name \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
Position or Title \_\_\_\_\_ Address \_\_\_\_\_  
Start Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mm/dd/yyyy)

### Gross Monthly Income

Base \$ \_\_\_\_\_ /month Bonus \$ \_\_\_\_\_ /month Military Entitlements \$ \_\_\_\_\_ /month  
Overtime \$ \_\_\_\_\_ /month Commission \$ \_\_\_\_\_ /month Other \$ \_\_\_\_\_ /month **TOTAL \$ \_\_\_\_\_ /month**

## Assets – Bank Accounts, Retirement, and Other Accounts You Have

Include all accounts below. Under Account Type, choose from the types listed here:

- Checking
- Certificate of Deposit
- Stock Options
- Bridge Loan Proceeds
- Trust Account
- Savings
- Mutual Fund
- Bonds
- Individual Development
- Cash Value of Life Insurance
- Money Market
- Stocks
- Retirement (e.g., 401k, IRA)
- Account
- (used for the transaction)

Account Type – use list above	Financial Institution	Account Number	Cash or Market Value
			\$
			\$
			\$
			\$
			\$
			\$
<b>Provide TOTAL Amount Here</b>			<b>\$</b>

## Property You Own If you are refinancing, list the property you are refinancing FIRST.

Address Street \_\_\_\_\_ Unit # \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ Country \_\_\_\_\_

## Loan and Property Information

Loan Amount \$ \_\_\_\_\_ Loan Purpose  Purchase  Refinance  Other (specify) \_\_\_\_\_

Property Address Street \_\_\_\_\_ Unit # \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_ County \_\_\_\_\_

Number of Units \_\_\_\_\_ Property Value \$ \_\_\_\_\_  
Occupancy  Primary Residence  Second Home  Investment Property **FHA Secondary Residence**