

Loan Officer: Martin Rodriguez

1st call _____

Pre Qual – Fact Sheet

2nd call _____

3rd call _____

Referral Source: _____ Todays Date _____

Borrower _____ SSN _____ DOB _____

Home Ph _____ Work Ph. _____ Cell Ph _____

Email _____

Co Borrower _____ SSN _____ DOB _____

Work Ph _____ Cell Ph _____ Email _____

Current Address _____ Yrs _____

Previous Address _____ Yrs _____

Employment Info

Employer: _____ Address _____

Job Title _____ Yrs on Job _____ Yrs on Work _____ W2 /1099 / other

Monthly Income _____ Other income /source _____

Co Borr Employer _____ Address _____

Job Title _____ Yrs on Job _____ Yrs on Work _____ W2 /1099 / other

Monthly Income _____ Other Income /source _____

Household Income _____

Assets and Debts

Bank _____ Account total _____ Avg Bal _____

401K _____ Other Investments _____

Name	Balance	Min Pmt due	Name	Balance	Min Pmt Due
Debt _____	_____	_____	Debt _____	_____	_____
Debt _____	_____	_____	Debt _____	_____	_____
Debt _____	_____	_____	Debt _____	_____	_____
Debt _____	_____	_____	Debt _____	_____	_____
Debt _____	_____	_____	Debt _____	_____	_____

Value of Home _____ Balance Owed on existing mtg _____ Current Mtg Pmt / Rent _____

Target Mtg Pmt _____ High _____ Low. Is subject property: SFR – Condo- Hi Rise – PUD

Current Impounds _____ Future Impounds _____ Down Pmt _____ Purch / Refi / Cashout

Credit Ratings

Known Fico _____ or Great / Good / Fair / Poor / BK year discharged _____

Mortgage lates _____ Foreclosure _____ Permission Granted to run Credit _____

Client Signature _____ Date _____