

Build Rapport / Investigate

Loan Purpose				
I <u>understand</u> that you are <u>interested</u> in...	Do you own the property by yourself or with someone else? by yourself / with someone else	Will you be the decision maker on this loan or will someone be assisting you? If so Whom?		
Contact Info				
Home #	Work # <small>Is it OK to call you there?</small>	Cell #	Fax	Email or any other way to reach you
Borrower				
Your SSN is...	Your date of birth is...	You work at \ retired from...?		What is your Position?
How long have you been in this line of work?	Your monthly Income before taxes is...?	Who Do I need to contact to verify your employment?		What is the best number to reach them?
As for Assets, do you have 401K and what are your Balances? Balance =	Investments / Stocks & Bonds? Balance =	IRA? Balance =	Checking / Savings? Balance =	
Co-Borrower				
Their SSN is...	Their date of birth is...	They work at \ retired from...?		What is their Position?
How long have they been in this line of work?	Their monthly Income before taxes is...?	Who Do I need to contact to verify their employment?		What is the best number to reach them?
As for Assets, do you have 401K and what are your Balances? Balance =	Investments / Stocks & Bonds? Balance =	IRA? Balance =	Checking / Savings? Balance =	
Other Income Do you receive any other income?				
Child Support	Alimony	Disability	Annuity	
Mortgage Info You are currently paying \$_____ to _____				
Current mo. Payment	Mtg Company	Does this include Taxes and Insurance? yes / no		
2 nd Mtg Payment	2 nd Mtg Company	Do you want taxes and insurance to be included with this loan yes / no		
What do you pay for Taxes Each Year?	What do you pay for Insurance Each Year?	Any other insurance or Homeowners' Assoc. dues?		
Property Info				
Estimated Value	When was your Last Appraisal:	Last Appraised Value:	Who did the Appraisal:	
Are there any Repairs / Improvements that need to be done:		Do you have any improvement projects going on right now?		
Age of Home	Living Area	Bedroom Count	Bathroom Count	Foundation slab / pier
Overall Condition good / average / fair		Location urban / suburban / rural	Name of Subdivision:	Property Dimension:
Amenities: (porch patio fence pool)		Updates made:		
Dates/Times available for Appraiser?				