

Mortgage Pre-Qual Short Form Application

Loan Type  Purchase  Refinance  HE 2<sup>nd</sup>  HELOC Loan Amount \_\_\_\_\_

Loan Term \_\_\_\_\_ months  Fixed  ARM Sales Price or Estimated Value \_\_\_\_\_

Amount of Down Payment \_\_\_\_\_ Source of Down Payment \_\_\_\_\_

**SUBJECT PROPERTY TYPE** **SFR** **PUD** **CONDO** **LAND/LOT** **INVESTMENT**

Subject Property City & State \_\_\_\_\_

Current Member?  No  Yes Account # \_\_\_\_\_

1. Borrower Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Married  Unmarried  Separated  Received permission to pull credit

2. Co-Borrower Name \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Married  Unmarried  Separated  Received permission to pull credit

3. Current Address \_\_\_\_\_ Zip \_\_\_\_\_  
Length of Residence \_\_\_\_\_  Own  Rent Phone \_\_\_\_\_

4. Former Address \_\_\_\_\_ Zip \_\_\_\_\_  
Length of Residence \_\_\_\_\_  Own  Rent Phone \_\_\_\_\_

5. Borrower's Employer \_\_\_\_\_ Work # \_\_\_\_\_  
Length of Employment \_\_\_\_\_ Gross Monthly Salary \_\_\_\_\_  
Previous Employment \_\_\_\_\_ Dates of Employment \_\_\_\_\_

6. Co-Borrower's Employer \_\_\_\_\_ Work # \_\_\_\_\_  
Length of Employment \_\_\_\_\_ Gross Monthly Salary \_\_\_\_\_  
Previous Employment \_\_\_\_\_ Dates of Employment \_\_\_\_\_

7. Retirement \_\_\_\_\_ Pension \_\_\_\_\_ Stocks \_\_\_\_\_

9. Present Value of Home \_\_\_\_\_ Balance Owed \_\_\_\_\_

10. Email \_\_\_\_\_ 11. Fax \_\_\_\_\_



**APPLICATION CONTINUED ON BACK**

12. Declarations

If they answer yes to any of the following questions, request an explanation and write it on the application.

	Borrower		Co-Borrower	
	Yes	No	Yes	No
a. Are there any outstanding judgments against you?	a <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Have you been declared bankrupt within the past 7 years?	b <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Have you had property foreclosed upon or given title or deed in lieu thereof in the last 7 years?	c <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Are you party to a lawsuit?	d <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Have you directly or indirectly been obligated on any loan which resulted in foreclosure, transfer of title in lieu of foreclosure, or judgment? 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 Lender, FHA or VA case number, if any, and reasons for action.	e <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Are you presently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation, bond, or loan guarantee? If "Yes," give details as described in the preceding question.	f <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Are you obligated to pay alimony, child support, or separate maintenance?	g <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If so, how much? Alimony _____ Child Support _____				
h. Is any or part of the down payment borrowed?	h <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Are you co-maker or endorser on a note?	i <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Are you a U.S. citizen?	j <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Are you a permanent resident alien?	k <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Do you intend to occupy the property as your primary residence? If yes, complete question m below.	l <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. Have you ever had an ownership interest in a property in the last 3 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(1) What type of property did you own – principal residence (PR), Second Home (SH), or investment property (IP)?	m1 _____	_____	_____	_____
(2) How did you hold title to the home – solely by yourself (S), jointly with your spouse (SP), or jointly with another person (O)?	m2 _____	_____	_____	_____

13. Information for Government Monitoring Purposes

Borrower <input type="checkbox"/> I do not wish to furnish the following information.	Co-Borrower <input type="checkbox"/> I do not wish to furnish the following information.
Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino	Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino
Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian	Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian
<input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Black or African American
Sex: <input type="checkbox"/> Female <input type="checkbox"/> Male	Sex: <input type="checkbox"/> Female <input type="checkbox"/> Male

Application Taken By \_\_\_\_\_ Date \_\_\_\_\_

Notes \_\_\_\_\_