

## Pre-Qualification Worksheet

### **Applicant Information**

Borrower Name: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_

Social Sec #: \_\_\_\_\_  
 Home Phone: (    ) \_\_\_\_\_  
 Work Phone: (    ) \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_

Co Borrower Name: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_

Social Sec #: \_\_\_\_\_  
 Home Phone: (    ) \_\_\_\_\_  
 Work Phone: (    ) \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_

### **Employment (past two years)**

Circle One*	Name of Employer**	Address	Dates Employed	Current or Ending Monthly Salary
B / C				
B / C				
B / C				
B / C				

\*For each entry, indicate B for Borrower, or C for co borrower

\*\*Self Employed borrowers may be required to provide additional documentation such as tax returns and financial statements.

### **Residence History (past two years) Circle Owned or Rented for each residence**

Circle One*	Monthly Payments	Address	Landlord Information	Dates
Owned/Rented				
Owned/Rented				
Owned/Rented				
Owned/Rented				

### **Other Income Sources**

Circle One*	Income Source	Monthly Amount
B / C		
B / C		
B / C		
B / C		

\*Examples include Rental, Retirement, Disability, Trust Funds, Social Security, Child Support Income etc

### **Assets - bank accounts, 401k, mutual funds, etc.**

Financial Institution	Account Number	Type of Account	Monthly Balance

**Liabilities - installment loans, credit cards, student loans, etc.**

Financial Institution/Debt Obligation	Monthly Amount	Unpaid Balance

**Declarations - Please respond Yes or No for each of the following**

	<u>Borrower</u> Yes / No	<u>Co-Borrower</u> Yes / No
Are there any outstanding judgments against you?		
Have you filed for bankruptcy or foreclosure within the past 7 years?		
Are you currently delinquent on any Federal or State obligation?		
Do you intend to occupy as your primary residence?		

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