

Help us serve you better. Please complete the following questions and ask your Sales Associate to make a copy for his/her file and for the Mortgage Loan Officer.

FINANCIAL INFORMATION SHEET

Purchaser's Full Name _____

Co-Purchaser's Full Name _____

Present Home Address _____

City _____ State _____ Zip _____

Purchaser's Occupation _____

Place of Employment _____ Number of Years _____

Employer's Address _____

Position Held _____ Business Phone _____ Ext. _____

If employed less than one year, also give information of previous employment.

Co-Purchaser's Employment _____ Number of Years _____

Employer's Address _____ Business Phone _____

Number of Dependents _____ Ages of Dependents _____

ANNUAL INCOME

Base pay of Purchaser \$ _____

Plus (overtime/bonus) \$ _____

Co-Purchaser's Income \$ _____

Plus (overtime/bonus) \$ _____

Net income from real estate \$ _____

Income from other sources (List sources/amounts)

_____ \$ _____

_____ \$ _____

_____ \$ _____

_____ \$ _____

Part-Time Employment

(Length of employment)

_____ \$ _____

TOTAL INCOME \$ _____

ASSETS

Cash Accounts (List)

1. Savings Account \$ _____

2. Checking Account \$ _____

3. Escrow Deposit \$ _____

Marketable Securities \$ _____

Value of real estate owned other than subject property \$ _____

Proceeds/sale of present home \$ _____

Cash Value of Life Insurance \$ _____

Other Assets:

1. Automobile \$ _____

2. Personal Property \$ _____

3. Other \$ _____

TOTAL \$ _____

LIABILITIES

	Total	Monthly Terms
Automobile	\$ _____	\$ _____
Bank Loans	\$ _____	\$ _____
Real Estate		
Mortgage	\$ _____	\$ _____
Personal Loans	\$ _____	\$ _____
Notes Payable	\$ _____	\$ _____
Installment		
Accounts	\$ _____	\$ _____
Current Accounts	\$ _____	\$ _____
Miscellaneous		
Expenses	\$ _____	\$ _____
	\$ _____	\$ _____
	\$ _____	\$ _____
Alimony/Child Support	\$ _____	\$ _____
Suits or Judgments	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____
Amount of VA Entitlement Available	\$ _____	
Source of Downpayment and/or Settlement Charges Not Shown Above:		
Assets	\$ _____	
Gift Letter	\$ _____	