



## Preferred Client Information Form

In order for me to best help you, please complete ALL applicable items. Your cooperation will be rewarded. Thank you.

Today's Date: ____ / ____ / ____ ; Who introduced you: _____		
<b><i>A - Personal Information</i></b>	<b><u>Borrower</u></b>	<b><u>Co-Borrower</u></b> (if info is same as Borrower, please write "same")
Name (as used on legal documents)		
What is Co-Borrower's relationship to the Borrower?		
Date of Birth	____ / ____ / ____	____ / ____ / ____
LEAVE BLANK	N/A	N/A
Home Street Address		
City, State, Zip		
Move-in date*	____ / ____ / ____	____ / ____ / ____
Do you Rent or Own this residence?		
If you rent, what is your monthly rent?		
Can you document on-time rent payments by 1)cancelled checks or 2)withdrawals from your bank account?		
Citizen of what country?		
If not US Citizen, what is R.A. #?		
Legal marital status		
If married and spouse is NOT a borrower, provide spouse's name and date of birth		
Hispanic or Not Hispanic?		
Race		
Last grade of school completed		
Cell phone		
Home tel		
email		
Dependent 1 (name, DOB in month/year)		
Dependent 2 (name, DOB in month/year)		
Dependent 3 (name, DOB in month/year)		
Dependent 4 (name, DOB in month/year)		
<b><i>B - Credit</i></b>		
Please describe your credit or give FICO score if known		
Any derogatory credit (bankruptcy, foreclosure, collection, etc.)		

\* If less than 2 years ago from today, also provide ALL details of prior residence(s) going back at least 24 months.

<b><u>C - Employment/Income</u></b>		If retired, please state whether income is taxable or not-taxable.
Job title		
Type of Industry		
# of years you've been in this industry		
Name of employer (use back if < 24 mos)		
Street Address		
City, State, Zip		
Main Telephone # for company		
Your direct work telephone #		
Initial start date for this employer*	____ / ____ / ____	____ / ____ / ____
Income		
If self-employed, tax type of entity and % owned		
Other Income 1 (state if not taxable)		
Other Income 2 (state if not taxable)		

\* If less than 2 years ago from today, also provide ALL details of prior employment(s) going back at least 24 months.

<b><u>D - Assets</u></b>	If account(s) is a joint account between Borrower and Coborrower, please state so.	
Bank1, type of account, and average balance		
Bank2, type of account, and average balance		
Bank3, type of account, and average balance		
<b><u>E - Liabilities</u></b>		
Sum of credit card balances		
Sum of monthly payments on these cards		
Car <b>lease</b> payment(s)		
car <b>loan</b> payment & # of mos left		
Other, balance, and payment		
Other, balance, and payment		
Other, balance, and payment		
Other, balance, and payment		
Child Support		

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**F - Real Estate Owned.** If more than 2 properties are owned, copy this sheet please.

<b>Property #1 or #</b>
Street Address:
City, State, Zip, County:
Name(s) of owners:
Date purchased: _____; Price paid: \$ _____; Today's value: \$ _____
Circle type [1Fam   2Fam   3Fam   4 Fam   condo   townhome   coop]; Circle Occupancy [ Primary   Vacation   Investment]
RE Taxes: \$ _____ /yr; Property Insurance: \$ _____ /yr; HOA/Maint: \$ _____ /mo; Rental Income: \$ _____ /month
If there is a mortgage on this property, please complete the information for the current 1st mortgage on this property
Lender: _____; Origination Date of Loan: ____ / ____ / ____; Original Loan amount: \$ _____
Balance: \$ _____; Interest Rate: _____ %; Circle one: [Fixed   Adjustable]
total monthly paymnt to bank: \$ _____; Breakdown: P&I:\$ _____; Escrow: \$ _____
If there is another mortgage or a home equity loan or line on this property , please complete the following:
Lender: _____; Circle one: [ Loan   Line of credit ]; Original loan or current limit: \$ _____
Date financed: ____ / ____ / ____; balance: \$ _____; Rate or Margin: _____ %; payment: \$ _____

<b>Property #2 or #</b>
Street Address:
City, State, Zip, County:
Name(s) of owners:
Date purchased: _____; Price paid: \$ _____; Today's value: \$ _____
Circle type [1Fam   2Fam   3Fam   4 Fam   condo   townhome   coop]; Circle Occupancy [ Primary   Vacation   Investment]
RE Taxes: \$ _____ /yr; Property Insurance: \$ _____ /yr; HOA/Maint: \$ _____ /mo; Rental Income: \$ _____ /month
If there is a mortgage on this property, please complete the information for the current 1st mortgage on this property
Lender: _____; Origination Date of Loan: ____ / ____ / ____; Original Loan amount: \$ _____
Balance: \$ _____; Interest Rate: _____ %; Circle one: [Fixed   Adjustable]
total monthly paymnt to bank: \$ _____; Breakdown: P&I:\$ _____; Escrow: \$ _____
If there is another mortgage or a home equity loan or line on this property , please complete the following:
Lender: _____; Circle one: [ Loan   Line of credit ]; Original loan or current limit: \$ _____
Date financed: ____ / ____ / ____; balance: \$ _____; Rate or Margin: _____ %; payment: \$ _____

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**G - Property Scenario Sheet**

In order to work on a PreApproval for a purchase, please complete ALL fields. It's okay to estimate or to write "N/A," which means Not Applicable. Please estimate rather than stating Not Available.

<b>Transaction Information</b>	
Purchase or Offer Price	
Estimated Current Value	
Down Payment (% or \$)	
Seller-Contribution (% or \$)	
Realtor's name	
<b>Property Information</b>	
County	
Zip Code. If you have an address, please provide	
Type (e.g., Single-family, condo, etc.)	
Occupancy Type (e.g., Primary, Vacation, or Investment property)	
If Investment, what is the projected monthly rent?	
Annual Real Estate Taxes	
Annual Homeowner's Insurance	
Annual Flood Insurance	
Monthly HOA/maintenance dues	
Issues/concerns regarding the condition of the property	
Public Water or Well Water?	
Public Sewer or Septic System?	
If property has either a Well or Septic, what is lot size?	
<b>If a Renovation Loan</b>	
Repairs and Improvements to be made	
Estimated Cost for these repairs	
Estimated Value of home once the improvements are done.	

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