

## Refinance - Pre-Qualification

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Last Name: \_\_\_\_\_ First: \_\_\_\_\_

Current Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone #s: Home: \_\_\_\_\_ Office: \_\_\_\_\_

Pager: \_\_\_\_\_ Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Source: \_\_\_\_\_

Co-Borrower S.S.#: \_\_\_\_\_ Status: \_\_\_\_\_

Birthday: \_\_\_\_\_

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Property Address: \_\_\_\_\_

How many units (families) is the property? \_\_\_\_\_

What are the proceeds going to be used for? (debt H/I) \_\_\_\_\_

What kind of mortgage do you presently have? \_\_\_\_\_

Current Percentage Rate: \_\_\_\_\_

Original purchase amount: \_\_\_\_\_ Down Payment: \_\_\_\_\_

Mortgage balance: \_\_\_\_\_

Mortgage holder: \_\_\_\_\_

Date acquired property: \_\_\_\_\_

Current property value: \_\_\_\_\_

Property Taxes: \_\_\_\_\_

Homeowners Insurance: \_\_\_\_\_

Expected CASH OUT on refinance: \_\_\_\_\_

What is your occupation: \_\_\_\_\_

Are you salaried or self employed? \_\_\_\_\_

Do you receive w2s and paystubs? \_\_\_\_\_

# of years in this position: \_\_\_\_\_

What is your Income per year: \_\_\_\_\_

How is your credit rating? \_\_\_\_\_

Are you current on your mortgage payments for last 12 months? \_\_\_\_\_

Do you have any Collections? Charge-offs? Judgements? \_\_\_\_\_

Is it ok if we run your Credit Report? \_\_\_\_\_

What is your total minimum monthly payment for all credit cards,  
installment loans, car loans, student loans? \_\_\_\_\_