Personal Information

Name *(First, Middle, Last, Suffix)*

_____

Social Security Number _____ – _____ – _____
(or Individual Taxpayer Identification Number)

Date of Birth ____ / ____ / _____
(mm/dd/yyyy)

Citizenship
◯ U.S. Citizen
◯ Permanent Resident Alien
◯ Non-Permanent Resident Alien

Type of Credit
◯ I am applying for **individual credit.**
◯ I am applying for **joint credit.** Total Number of Borrowers: __
Each Borrower intends to apply for joint credit. **Your initials:** _____

Contact Information
Home Phone (____) ____ – _____
Work Phone (____) ____ – _____ **Ext.** _____
Email _____

Marital Status
◯ Married
◯ Separated
◯ Unmarried
(Single, Divorced, Widowed, Civil Union, Domestic Partnership, Registered Reciprocal Beneficiary Relationship)

Current Address
Street _____ Unit # _____
City _____ State _____ ZIP _____ Country _____
How Long at Current Address? ___ Years ___ Months **Housing** ◯ No primary housing expense ◯ Own ◯ Rent ($ _____ /month)

If at Current Address for LESS than 2 years, list Former Address ☐ ***Does not apply***
Street _____ Unit # _____
City _____ State _____ ZIP _____ Country _____
How Long at Former Address? ___ Years ___ Months **Housing** ◯ No primary housing expense ◯ Own ◯ Rent ($ _____ /month)

Mailing Address – *if different from Current Address* ☐ ***Does not apply***
Street _____ Unit # _____
City _____ State _____ ZIP _____ Country _____

Current Employment/Self-Employment and Income ☐ *Does not apply*

Employer or Business Name _____ Phone (____) ____ – _____
Position or Title _____ Address _____
Start Date ____ / ____ / _____ *(mm/dd/yyyy)*

Gross Monthly Income
Base $ _____ /month Bonus $ _____ /month Military Entitlements $ _____ /month
Overtime $ _____ /month Commission $ _____ /month Other $ _____ /month **TOTAL $** 0.00 **/month**

Assets – Bank Accounts, Retirement, and Other Accounts You Have

Include all accounts below. Under Account Type, choose from the types listed here:
- Checking
- Savings
- Money Market
- Certificate of Deposit
- Mutual Fund
- Stocks
- Stock Options
- Bonds
- Retirement *(e.g., 401k, IRA)*
- Bridge Loan Proceeds
- Individual Development Account
- Trust Account
- Cash Value of Life Insurance *(used for the transaction)*

Account Type – *use list above*	**Financial Institution**	**Account Number**	**Cash or Market Value**
			$
			$
			$
			$
			$
		Provide TOTAL Amount Here	**$** 0.00

Property You Own

If you are refinancing, list the property you are refinancing FIRST.

Address Street _____ Unit # _____
City _____ State _____ ZIP _____ Country _____

Loan and Property Information

Loan Amount $ _____ **Loan Purpose** ◯ Purchase ◯ Refinance ◯ Other *(specify)* _____
Property Address Street _____ Unit # _____
City _____ State _____ ZIP _____ County _____
Number of Units _____ **Property Value $** _____
Occupancy ◯ Primary Residence ◯ Second Home ◯ Investment Property **FHA Secondary Residence** ☐