SMART-QUAL Mortgage Information Request Form

MORTGAGE AMOUNT AND TYPE OF LOAN

Amount	Loan Type: ☐ ARM ☐ Balloon ☐ Fixed

PROPERTY INFORMATION AND PURPOSE OF LOAN

Subject Property Address (street, city, state & zip code)	Purchase Price/Estimated Value:	No. of Units

Purpose of Loan ☐ Purchase ☐ Construction ☐ Other (explain) ☐ Refinance ☐ Construction-Permanent	Property will be: ☐ Primary Residence ☐ Secondary Residence ☐ Investment

BORROWER INFORMATION

Borrower				Co-Borrower			
Borrower's Name (include Jr. or Sr. if applicable)				Co-Borrower's Name (include Jr. or Sr. if applicable)			
Social Security #	Home Phone (including area code)	Age	Yrs. School	Social Security #	Home Phone (including area code)	Age	Yrs. School
☐ Married ☐ Unmarried ☐ Separated	Dependents (not listed by Co-Borrower) no. ages			☐ Married ☐ Unmarried ☐ Separated	Dependents (not listed by Borrower) no. ages		
Present Address (street, city, state, ZIP) ☐ Own ☐ Rent _____No. Yrs.				Present Address (street, city, state, ZIP) ☐ Own ☐ Rent _____No. Yrs.			

EMPLOYMENT INFORMATION

Borrower			Co-Borrower		
Name & Address of Employer ☐ Self Employed	Yrs on this Job Yrs. employee in this line of work/profession		Name & Address of Employer ☐ Self Employed	Yrs on this Job Yrs. employee in this line of work/profession	
Position/Title/Type of Business	Business Phone (incl.area code)		Position/Title/Type of Business	Business Phone (incl.area code)	

MONTHLY INCOME AND COMBINED HOUSING EXPENSE INFORMATION

Gross Monthly Income	Borrower	Co-Borrower	Total	Combined Monthly Housing Expense	Present	Proposed
Base Empl. Income				Rent		
Overtime				First Mortgage (P&I)		
Bonus				Hazard Insurance		
Commissions				Real Estate Taxes		
Dividends/Interest				Mortgage Insurance		
Net Rental Income				Homeowner Assn. Dues		
Other:				Other:		
Total				Total		

ASSETS		LIABILITIES		INTERNAL USE ONLY	
Asset Description	Estimated Market Value	Liability Description	Total Indebtedness	Minimum Monthly Pymt	RATE:
Checking		Credit Cards			LTV:
Savings		Car Payments			RATIOS:
IRA/401(K)		Student Loans			ESCROW WAIVER:
Other:		Other:			OTHER:
Total		Total			OTHER:

The undersigned acknowledges and understand that this is a request for information and not an application or commitment for a loan. The undersigned authorize the release of all credit information, pertinent to verifying the credit information provided above, to

_____ _____

Borrower Date Co-Borrower Date