

Borrower Name: \_\_\_\_\_  
 Loan Number: \_\_\_\_\_

**FINANCIAL WORKSHEET**

**BORROWER INFORMATION**

Property Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Hm #: \_\_\_\_\_ Wk #: \_\_\_\_\_  
 Cell #: \_\_\_\_\_  
 Best time to call: \_\_\_\_\_ E mail: \_\_\_\_\_

Please check all that apply:  
 I live in this house  
 Occupants in home: \_\_\_\_\_  
 This is a second house  
 This house is vacant  
 This is a rental property  
 (monthly rent: \$ \_\_\_\_\_)  
 Active Bankruptcy

Borrower Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Co-Borrower Name \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 \_\_\_\_\_

**EMPLOYMENT INFORMATION**

**BORROWER**

**CO-BORROWER**

Employer Position \_\_\_\_\_ Employer Position \_\_\_\_\_  
 \_\_\_\_\_

**INCOME DATA**

HOUSEHOLD INCOME	PRIMARY HOMEOWNER		ADDITIONAL OCCUPANT(S)	
	CURRENT		CURRENT	
	Gross	Net	Gross	Net
Employment Income	\$		\$	
Disability	\$		\$	
Rental Income	\$		\$	
Unemployment	\$		\$	
Child Support / Alimony	\$		\$	
Other	\$		\$	
<b>TOTAL MONTHLY INCOME</b>				

**Income Frequency: (please check one)**

**Primary Homeowner:**

Weekly  Bi-Weekly  Semi Monthly  Monthly  Quarterly  Yearly

**Additional Occupant(s):**

Weekly  Bi-Weekly  Semi Monthly  Monthly  Quarterly  Yearly

**Current Employment Status Primary Homeowner:** (please check one)

Employed Full-Time  Employed Part-Time  Unemployed/Not Working  Self-Employed  Retired

**Current Employment Status Additional Occupant(s):** (please check one)

Employed Full-Time  Employed Part-Time  Unemployed/Not Working  Self-Employed  Retired

**ASSETS / LIABILITIES**

DESCRIPTION	ESTIMATED VALUE	AMOUNT OWED	NET VALUE
Automobile Make / Model			
Deposit Accounts – Checking / Savings			
IRA / KEOUGH Accounts			
401K Savings Plan			
Stocks / Bonds / CDs			

