

Date Application was taken: \_\_\_\_\_  
Date File was submitting to Processing: \_\_\_\_\_

## Loan & Borrower Information Sheet

Loan Officer: \_\_\_\_\_ L.O.'s Phone #: \_\_\_\_\_

Borrowers Name: \_\_\_\_\_ Borrowers Phone #: \_\_\_\_\_  
BEST TIME TO CONTACT THE BORROWER (IF NECESSARY): \_\_\_\_\_

Product: FHA                      CONVENTIONAL                      VA    (CIRCLE ONE)

Interest Rate Quoted: \_\_\_\_\_ %    Borrower would like 1st Payment DATE: \_\_\_\_\_

|                      |                           |                  |
|----------------------|---------------------------|------------------|
| _____ PURCHASE       | _____ OWNER OCCUPIED      | _____ # OF UNITS |
| _____ RATE/TERM REFI | _____ INVESTMENT PROPERTY | _____ PUD        |
| _____ CASH OUT REFI  | _____ SECOND HOME         | _____ CONDO      |
| _____ FHA STREAMLINE | _____ DU REFI PLUS        |                  |

LOAN AMOUNT (base)                      \$ \_\_\_\_\_  
ESTIMATED PROPERTY VALUE                      \$ \_\_\_\_\_  
SALES PRICE (IF APPLIES)                      \$ \_\_\_\_\_

\*LOAN MUST CLOSE ON or BEFORE/ P.A. Expiration DATE: \_\_\_\_\_

\*CLOSING PACKAGE REQUIRED TO TITLE CO \_\_\_\_\_ DAYS  
PRIOR TO CLOSING.

CHECK ALL THAT APPLY / FILL IN IF APPLIES:

\_\_\_\_\_ REALTOR / REALTOR'S NAME & PHONE NUMBER: \_\_\_\_\_  
\_\_\_\_\_ SELLER'S TITLE COMPANY & TITLE CO INFO: \_\_\_\_\_  
\_\_\_\_\_ BORROWER HAS UNPAID TAX LIENS or FEDERAL TAXES or ASSESSMENTS DUE  
\_\_\_\_\_ BORROWER HAS DEBTS PAID BY OTHERS (PROOF TO BE PROVIDED)  
\_\_\_\_\_ HOME OWNERS ASSOCIATION & FEE'S: \_\_\_\_\_  
\_\_\_\_\_ PAYOFF ON HOME NOT SHOWING ON CREDIT REPORT-MTG INFO PROVIDED  
\_\_\_\_\_ ESCROWS BEING WAIVED (ONLY CONVENTIONAL)



### Comments / Extra Information to help Processing/Underwriting:

(Is the property: Bank Owned, A Short Sale, Are City /County taxes coming due & what date, low YTD/ explanation... Any information you feel your Processor needs to know about this file..)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_