

# Company Name

## Mortgage Loan Application Form

You may complete this form and send it to us using our secure server by clicking on the "Submit" button below or you may fill in the information, print the form from your browser window by clicking "Print Page" button above and mail or fax the form to:



**Company Name**  
Company Address  
City, State, Zip  
Tel. (555) 555-5555  
Fax (555) 555-5555  
www.domain.com

\* Denotes Required Field

### Type of Loan Requested

Mortgage Applied For:  
Residence Type:  
Property Type:  
Loan Type:  
Amortization Type:  
Loan Amount Requested: \$  
Interest Rate: %

### Current Auto Insurance Information

\*Name:  
\*Social Security Number: *Ex. 333-44-5555*  
\*Address:  
\*City: \*State: \*Zip Code:  
\*Day Phone: \*Evening Phone: *Ex: 920-111-2222*  
Best Time to Call:  
\*E-Mail Address:  
\*Confirm E-Mail Address:

*If you have resided at your present address less than 2 years, please complete the following section(s):*

Former Address #1:  
City: State: Zip Code:  
Did you own or rent this property?:  
Time at this Property: Years Months  
Former Address #1:  
City: State: Zip Code:  
Did you own or rent this property?:  
Time at this Property: Years Months

## Co-Applicant Information

Name:  
Social Security Number: *Ex. 333-44-5555*  
Address:  
City: State: Zip Code:  
Day Phone: Evening Phone: *Ex: 920-111-2222*  
Best Time to Call:  
E-Mail Address:  
Confirm E-Mail Address:

*If you have resided at your present address less than 2 years, please complete the following section(s):*

Former Address #1:  
City: State: Zip Code:

Did you own or rent this property?:  
Time at this Property: Years Months

Former Address #1:  
City: State: Zip Code:

Did you own or rent this property?:  
Time at this Property: Years Months

## Property Information

*Choose either Bodily Injury AND Property Damage, OR Single Limit*

*Please provide information about the property for which you are applying for this loan:*

Property Address:  
City: State: Zip Code:  
Number of Units: Year Built:

*If this is a construction or construction-permanent loan, please answer the following:*

Year Acquired: Original Cost: \$ Existing Liens: \$  
Present Value: \$ Improvements Cost: \$

*If this is a refinancing loan, please answer the following:*

Year Acquired: Original Cost: \$ Existing Liens: \$

Purpose of Refinance:  
Describe Improvements: Improvements Cost: \$

## Title Information

Name(s) in which Title Will Be Held: 1.  
2.

Manner in Which Title Will Be Held:

The Estate Will Be Held In:

*If "Leasehold" was selected in the above option, please give the expiration date:*

*Ex. 01/15/2006*

**Source of Down Payment, Settlement Charges, and/or  
Subordinate Financing:**

**Applicant Employment Information**

**Current Employer:**  
**Employment Address:**  
City: State: Zip Code:  
Work Phone: Fax: Ex: 920-111-2222  
Position/Title: Self Employed?:  
Monthly Income: \$ Work Schedule:  
Years on Job: Years in Same Field:

*If employed in current position less than two years or if currently employed in more than one position, please complete the following:*

**Additional Employer:**  
**Employment Address:**  
City: State: Zip Code:  
Employer Phone: Fax: Ex: 920-111-2222  
Position/Title: Self Employed?:  
Monthly Income: \$ Work Schedule:  
Begin Date: End Date: Ex. 01/15/2007

*OTHER additional employer in the last two years:*

**Other Employer:**  
**Employment Address:**  
City: State: Zip Code:  
Employer Phone: Fax: Ex: 920-111-2222  
Position/Title: Self Employed?:  
Monthly Income: \$ Work Schedule:  
Begin Date: End Date: Ex. 01/15/2007

**Co-Applicant Employment Information**

**Current Employer:**  
**Employment Address:**  
City: State: Zip Code:  
Work Phone: Fax: Ex: 920-111-2222  
Position/Title: Self Employed?:  
Monthly Income: \$ Work Schedule:  
Years on Job: Years in Same Field:

*If employed in current position less than two years or if currently employed in more than one position, please complete the following:*

**Additional Employer:**  
**Employment Address:**  
City: State: Zip Code:  
Employer Phone: Fax: Ex: 920-111-2222

**Position/Title:** **Self Employed?:**  
**Monthly Income: \$** **Work Schedule:**  
**Begin Date:** **End Date:** *Ex. 01/15/2007*

*OTHER additional employer in the last two years:*

**Other Employer:**  
**Employment Address:**  
**City:** **State:** **Zip Code:**  
**Employer Phone:** **Fax:** *Ex: 920-111-2222*  
**Position/Title:** **Self Employed?:**  
**Monthly Income: \$** **Work Schedule:**  
**Begin Date:** **End Date:** *Ex. 01/15/2007*

### Income Information

*Please provide answers based on GROSS MONTHLY INCOME*

Source	Applicant	Co-Applicant
Base Employment Income:	\$	\$
Overtime:	\$	\$
Bonuses:	\$	\$
Commissions:	\$	\$
Dividends/Interest:	\$	\$
Net Rental Income:	\$	\$

*Please describe any other income*

Source	Applicant	Co-Applicant
Base Employment Income:	\$	\$
Overtime:	\$	\$
Bonuses:	\$	\$
Commissions:	\$	\$
Dividends/Interest:	\$	\$
Net Rental Income:	\$	\$

### Combined (Current) Monthly Housing Expenses

**Rent: \$**  
**First Mortgage (Principle & Interest): \$**  
**Other Financing (Principle & Interest): \$**  
**Hazard Insurance: \$**  
**Real Estate Taxes: \$**  
**Mortgage Insurance: \$**  
**Homeowner Association Dues: \$**  
**Other: \$**

## Assets

### Bank Account #1

Account Type: Current Balance:  
Financial Institution: Account #:  
Address:  
City: State: Zip Code:

### Bank Account #2

Account Type: Current Balance:  
Financial Institution: Account #:  
Address:  
City: State: Zip Code:

### Bank Account #3

Account Type: Current Balance:  
Financial Institution: Account #:  
Address:  
City: State: Zip Code:

### Bank Account #4

Account Type: Current Balance:  
Financial Institution: Account #:  
Address:  
City: State: Zip Code:

### Bank Account #5

Account Type: Current Balance:  
Financial Institution: Account #:  
Address:  
City: State: Zip Code:

### Stocks & Bonds

Please Describe: Current Value: \$  
Please Describe: Current Value: \$  
Please Describe: Current Value: \$  
Please Describe: Current Value: \$  
Please Describe: Current Value: \$

### Other Assets

Life Insurance (Describe): Face Amount: \$  
Life Insurance (Describe): Face Amount: \$  
Retirement Acct. (Describe): Current Value: \$

Retirement Acct. (Describe):	Current Value: \$
Business - Owned (Describe):	Net Worth: \$
Autos - Owned (Describe):	Est. Value: \$
Autos - Owned (Describe):	Est. Value: \$
Autos - Owned (Describe):	Est. Value: \$
Other Assets (Describe):	Value/Amount: \$
Other Assets (Describe):	Value/Amount: \$
Other Assets (Describe):	Value/Amount: \$

### Monthly Debts

#### Debt #1

Debt Description:		
Current Balance:	Monthly Payment: \$	
Financial Institution:	Account #:	
Address:		
City:	State:	Zip Code:

#### Debt #2

Debt Description:		
Current Balance:	Monthly Payment: \$	
Financial Institution:	Account #:	
Address:		
City:	State:	Zip Code:

#### Debt #3

Debt Description:		
Current Balance:	Monthly Payment: \$	
Financial Institution:	Account #:	
Address:		
City:	State:	Zip Code:

#### Debt #4

Debt Description:		
Current Balance:	Monthly Payment: \$	
Financial Institution:	Account #:	
Address:		
City:	State:	Zip Code:

#### Debt #5

Debt Description:	
Current Balance:	Monthly Payment: \$

**Financial Institution:**

**Account #:**

**Address:**

**City:**

**State:**

**Zip Code:**

## **Schedule of Real Estate Owned**

### **Property #1**

**Property Address:**

**City:**

**State:**

**Zip Code:**

**Type of Property:**

**Present Market Value: \$**

**Property Mortgage Liens: \$**

**Gross Rental Income: \$**

**Mortgage Payments: \$**

**Insurance, Taxes & Maintenance: \$**

**Net Rental Income: \$**

### **Property #2**

**Property Address:**

**City:**

**State:**

**Zip Code:**

**Type of Property:**

**Present Market Value: \$**

**Property Mortgage Liens: \$**

**Gross Rental Income: \$**

**Mortgage Payments: \$**

**Insurance, Taxes & Maintenance: \$**

**Net Rental Income: \$**

### **Property #3**

**Property Address:**

**City:**

**State:**

**Zip Code:**

**Type of Property:**

**Present Market Value: \$**

**Property Mortgage Liens: \$**

**Gross Rental Income: \$**

**Mortgage Payments: \$**

**Insurance, Taxes & Maintenance: \$**

**Net Rental Income: \$**

## **Additional Comments**

*Please provide any additional comments that you feel would be appropriate for this quotation. If you have additional information to provide, where there were not enough fields above, such as additional drivers, vehicles, driver histories, etc., please enter it here:*

## \*Acknowledgement and Consent

I hereby certify that the above information is complete and accurate to the best of my knowledge. The agency receiving this application will retain the application whether or not a policy is issued. The agency may rely on this application when determining the quotation and when deciding whether to issue a policy. False statements may subject me to criminal penalties. I authorize the agency to obtain a CLUE report and credit report about me on an ongoing basis during this quotation and policy period and to check my claims history and credit report on an ongoing basis during the term of the quotation and policy period.

If a policy is issued, I authorize the agency to give information about me to its affiliates.      **Yes**      **No**

**\*Enter Your Initials Here:**

**\*Today's Date:**

*EX: 01/12/2007*

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