

## Loan Pre-Approval Process

1. Please fill out information below completely
2. Email form to [baulin@gmail.com](mailto:baulin@gmail.com)
3. We will pre-underwrite your file at NO-COST

Subject Property Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Owner Occupied     2<sup>nd</sup> Home     Investment

### **Borrower**

Name: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Current Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Married     Unmarried     Separated

# of Dependents: \_\_\_\_\_    Ages: \_\_\_\_\_

Date of Birth (MO/DY/YEAR): \_\_\_\_\_

Own     Rent    Date Acquired \_\_\_\_\_

Monthly Housing Payment \$ \_\_\_\_\_

### **Please list 2 years Employment History**

Self Employed

Current Employer: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Work address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Yrs. With Current Employer \_\_\_\_\_ Yrs. In Profession \_\_\_\_\_

Position: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

Monthly Debt: \_\_\_\_\_

(Car Payment/Credit Cards, Etc., Alimony, Child Support)

### **Co-Borrower**

Name: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Current Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Married     Unmarried     Separated

# of Dependents: \_\_\_\_\_    Ages: \_\_\_\_\_

Date of Birth (MO/DY/YEAR): \_\_\_\_\_

Own     Rent    Date Acquired \_\_\_\_\_

Monthly Housing Payment \$ \_\_\_\_\_

### **Please list 2 years Employment History**

Self Employed

Current Employer: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Work address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Yrs. With Current Employer \_\_\_\_\_ Yrs. In Profession \_\_\_\_\_

Position: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

Monthly Debt: \_\_\_\_\_

(Car Payment/Credit Cards, Etc., Alimony, Child Support)

**Employment History (continued)**

Self Employed

Previous Employer: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Work address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Yrs. With Current Employer \_\_\_\_ Yrs. In Profession \_\_\_\_

Position: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

**Employment History (continued)**

Self Employed

Previous Employer: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Work address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Yrs. With Current Employer \_\_\_\_ Yrs. In Profession \_\_\_\_

Position: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

**Assets**

Checking: \$ \_\_\_\_\_ Savings: \$ \_\_\_\_\_ 401k/Retirement: \$ \_\_\_\_\_ Brokerage/Stocks: \$ \_\_\_\_\_

**Additional List of Properties Owned**

Address \_\_\_\_\_  
Rental \$ \_\_\_\_\_ Mort Pay \$ \_\_\_\_\_ Tax & Insur. \$ \_\_\_\_\_

Address \_\_\_\_\_  
Rental \$ \_\_\_\_\_ Mort Pay \$ \_\_\_\_\_ Tax & Insur. \$ \_\_\_\_\_

Address \_\_\_\_\_  
Rental \$ \_\_\_\_\_ Mort Pay \$ \_\_\_\_\_ Tax & Insur. \$ \_\_\_\_\_

**For Purchase Approval Only (not for refinances)**

Down payment: \$ \_\_\_\_\_ Net Proceeds: \$ \_\_\_\_\_ (Sale of Present Home)

Savings \$ \_\_\_\_\_ Gift: \$ \_\_\_\_\_

Other (Please Indicate) \$ \_\_\_\_\_ Sale of Stock, Etc. \$ \_\_\_\_\_

Est. Sales Price \$ \_\_\_\_\_ Est. Loan Amount \$ \_\_\_\_\_

**(PLEASE HAVE ALL THE ITEMS READY TO FAX OR EMAIL): ONLY applicable documents are needed**

- \*2009/2010 W-2's (for salaried employees)
- \*If self-employed 2008/2009 federal tax returns w/ all attached pages & schedules (replace 2008 w/ 2010 if complete) (Tax Returns also needed if you have rental property claimed on your schedule E)
- \*LAST TWO CONSECUTIVE PAY STUBS – 30 days
- \*2 MOST RECENT MONTH'S BANK STATEMENTS (all pages)
- \*LATEST QUARTERLY 401K AND/OR IRA STATEMENTS (all pages)
- \*LATEST (2 months) BROKERAGE STATEMENTS (all pages) –if applicable
- \*Mortgage Statement (for all properties)
- \*Homeowners Insurance (for all properties)
- \*Copy of Driver's Licenses

**To PRINT go to "File", then "Print" and select "PDF"**