

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

Loan Number: \_\_\_\_\_

**FINANCIAL WORKSHEET**

**BORROWER INFORMATION**

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

**Homeowner Questionnaire:**  
 Do you currently occupy the home  Yes  No  
 Is this the only home you own  Yes  No  
 Are you interested in retaining your home  Yes  No  
 What was the reason for your default?  
 Has this situation been resolved such  
 that you can resume making payments?  Yes  No  
 Are you in Active Bankruptcy  Yes  No  
 Is this house vacant  Yes  No

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			

