

# Borrower Summary

## I. Borrower Information

Borrower Name \_\_\_\_\_ SSN \_\_\_\_\_ H Phone # \_\_\_\_\_  
E-Mail \_\_\_\_\_ Cell / Alt # \_\_\_\_\_ B Phone # \_\_\_\_\_  
Birthday \_\_\_\_\_ Fax # \_\_\_\_\_

Co-Borrower Name \_\_\_\_\_ SSN \_\_\_\_\_ H Phone # \_\_\_\_\_  
E-Mail \_\_\_\_\_ Cell / Alt # \_\_\_\_\_ B Phone # \_\_\_\_\_  
Birthday \_\_\_\_\_ Fax # \_\_\_\_\_

Present Address \_\_\_\_\_ Personal Interests \_\_\_\_\_  
\_\_\_\_\_ Children's Info. \_\_\_\_\_

## II. Property Information

Property Address \_\_\_\_\_  
\_\_\_\_\_

Occupancy Status  Primary Residence Sales Price \_\_\_\_\_  
 Second Home Down Payment/Equity \_\_\_\_\_  
 Investment Property Appraised Value \_\_\_\_\_

## III. Mortgage Information

### Note Information

Loan Amount \_\_\_\_\_  
Note Rate \_\_\_\_\_  
Term (in months) \_\_\_\_\_  
Due (in months) \_\_\_\_\_  
Monthly Payment \_\_\_\_\_

### Lien Position

First  
 Second

Loan Program: \_\_\_\_\_  
Loan Rep: \_\_\_\_\_

## IV. Underwriting Information

Qualifying Ratios		Loan-to-Value Ratios		Total Income _____
Primary Housing Expense/Income _____ %		LTV _____ %		Total House Exp _____
Total Obligations/Income _____ %		Total LTV _____ %		Other Payments _____

## V. Contact Information

Contact Date	Time	Memo

Source: \_\_\_\_\_

Comments: