LO		Date		Source	

Customers Goals	1	
	2	
	3	
	4	

Name		SS#		DOB	
Name		SS#		DOB	

Address		How Long in Home	
		Purchase Price	
Last Time Appraised		Age of Home	

Appraised Amount		Mortgage Company				
			Payment			
Currant Balance			Rate			
			Term			
Equity			Type			
			Escrow	Yes		No
			Taxes			
			Insurance			

Borrower **EMPLOYMENT HISTORY**

Employer		How Long		Gross income	
Address					
		Job Title			
Phone		Job Description			
Previous		How Long		Gross income	
Address					
		Job Title			
Phone		Job Description			

Co-Borrower

Employer		How Long		Gross income	
Address					
		Job Title			
Phone		Job Description			
Previous		How Long		Gross income	
Address					
		Job Title			
Phone		Job Description			

House Description	Bedrooms		City Water	
	Bathrooms		Sewer	
Notes on House	Total Rooms		Central Air	
	Square Feet		Roof	
	Garage		Deck	
	Exterior		Pool	
	Lot Size/Acres		Special Feature	
	Driveway		Special Feature	