

REFINANCE APPLICATION

Full Name _____

Your Social Security Number _____

Your Home Phone _____ Cell _____

Email _____

Birth date _____

Years of school
(for example, High School:12, Undergrad:16, etc.) _____

Are you married? Yes No

How many dependents? _____

Your current address:

Street _____

City _____ State _____ ZIP _____

Approximate Value: \$ _____

Current Mortgage: 1st: Balance \$ _____ Payment \$ _____

2nd: Balance \$ _____ Payment \$ _____

Are taxes and insurance included in your current payment? Yes No

No. of years in current home _____

► **If less than 2 years, Former address:**

Street _____

City _____ State _____ ZIP _____

Own Rent No. of years? _____

Do you own any other Real Estate?

Street _____

City _____ State _____ ZIP _____

Approximate Value: \$ _____

Current Mortgage: 1st: Balance \$ _____ Payment \$ _____

2nd: Balance \$ _____ Payment \$ _____

Is it rented? Yes No If so, how much do you collect in rent? _____

Employment Info

Company Name _____

Street Address _____

City _____ State _____ ZIP _____

Business Phone _____

Self employed? Yes No

Years on this job _____

Years in this line of work/profession _____

Position/Title _____

Gross Monthly Income _____

► ***If you have been in your current job for less than 2 years:***

Former employer Company Name _____

Street Address _____

City _____ State _____ ZIP _____

Business phone _____

Self employed? Yes No

Years on this job _____

Years in this line of work/profession _____

Position/Title _____

Gross Monthly Income _____

Financial Info

Name of bank _____ Average checking balance \$ _____

Name of bank _____ Savings balance \$ _____

Estimates from IRA, 401k, etc. _____

► *If you have several accounts, please list them at the bottom of the page.*

Property Info

The property you want to refinance is:

Primary residence Vacation home Investment

When did you purchase the property? _____

What was the purchase price? _____

Does the mortgage you want to refinance have a prepayment penalty? Yes No

What is the purpose of the refinance? _____

What are the terms of your current mortgage? Rate? _____ Fixed/ARM? _____

Do you want to take cash out? Yes No

If so, how much? \$ _____

Approximate annual property taxes: \$ _____

Approximate annual insurance premium: \$ _____

Do we have permission to pull your credit upon receipt of this application? Yes No

Other comments:

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