

worksheet • Mortgage Pre-Qualification

Below are items of information your mortgage company may ask when pre-qualifying you for a mortgage. Use this as a handy all-in-one reference sheet. Also, at the bottom you will find a list of other receipts and papers you will need for verification.

Name/Rank (If Military) _____
 Co-Purchaser's Full Name _____
 Present Home Address _____ Home Phone _____
 _____ Zip _____
 Purchaser's Occupation _____ Mil/Years of Service _____
 Place of Employment _____ Number of Years _____
 Position Held _____ Business Phone _____ Ext. _____
If employed less than one year, also give information of previous employment.
 Co-Purchaser's Employment _____ Number of Years _____
 Employer's Address _____ Business Phone _____
 Number of Dependents _____ Ages of Dependents _____

MONTHLY INCOME

Base pay of purchaser	\$ _____
Plus (overtime bonus)	\$ _____
Co-Purchaser's Income	\$ _____
Plus (overtime bonus)	\$ _____
Net Income from real estate	\$ _____
Income from other sources (List sources & amounts)	_____
_____	\$ _____
_____	\$ _____
_____	\$ _____
Part-Time Employment (Length of employment)	_____
TOTAL INCOME	\$ _____

ASSETS

Cash Accounts (List)	Amount
1. Savings acct	\$ _____
2. Checking acct	\$ _____
3. Escrow deposit	\$ _____
Marketable Securities	\$ _____
Value of real estate owned other than subject property	\$ _____
Proceeds from sale of present home	\$ _____
Cash Value of life insurance	\$ _____
Other Assets:	
1. Automobile	\$ _____
2. Personal property	\$ _____
3. Other	\$ _____
TOTAL	\$ _____

LIABILITIES

	Total Owed	Monthly Payment
Automobile	\$ _____	\$ _____
Bank loans	\$ _____	\$ _____
Real estate mortgage	\$ _____	\$ _____
Personal loans	\$ _____	\$ _____
Notes payable	\$ _____	\$ _____
Installment accts	\$ _____	\$ _____
Credit card accts	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
Miscellaneous Expenses	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
Alimony/Child support	\$ _____	\$ _____
Suits or judgments	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

Source of down payment
and/or settlement charges
not shown above: Assets: \$ _____
Gift Letter: \$ _____

Have you ever used your VA? _____
 If yes, has that loan been paid off? _____
 If no, what year did it originate _____
 & approximate loan amount _____

** Please use a separate sheet for any additional information **



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