

Financial Information Worksheet

Loan number: _____

Current Total Monthly Gross Income

For every borrower listed on the mortgage, enter the monthly income (before taxes) as well as employment and contact information.

1	Current Household Monthly Gross Income - Borrower	\$	
2	Employer Name - Borrower		
3	Employer Phone Number - Borrower		
4	Current Household Monthly Gross Income - Co-Borrower	\$	
5	Employer Name - Co-Borrower		
6	Employer Phone Number - Co-Borrower		
7	Current Household Monthly Gross Income - Other (ex. alimony, child support, rental income, etc.)	\$	
8	Total Current Household Income	\$	

Prior Total Monthly Gross Income

If you've had a financial hardship, enter your monthly income (before taxes) prior to the hardship for each person listed on the mortgage.

9	Has your income changed?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
10	Was the change in your income involuntary?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
11	Prior Household Monthly Gross Income - Borrower	\$			
12	Prior Household Monthly Gross Income - Co-Borrower	\$			
13	Prior Household Monthly Gross Income - Other	\$			
14	Prior Household Monthly Gross Income - Total	\$			

Anticipated Future Total Household Monthly Gross Income

As your situation changes, help us understand the monthly (before taxes) income you anticipate for every borrower listed on the mortgage.

15	Do you anticipate any future changes in your income?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
16	Anticipated Future Household Monthly Gross Income - Borrower	\$			
17	Anticipated Future Household Monthly Gross Income - Co-Borrower	\$			
18	Anticipated Future Household Monthly Gross Income - Other	\$			
19	Anticipated Future Household Monthly Gross Income - Total	\$			

General Questions

- 20 After all of your monthly expenses are paid, how much do you have left? \$
- 21 How much money do you have to contribute towards your loan balance? \$
- 22 How many people are in your household?
- 23 Do you have ownership interest in other residential real estate (including homes/rental properties) Yes No

Monthly Payment Items and Property Information

- 24 Monthly Property Tax Payment (ex. county taxes, city taxes) \$
- 25 Monthly Insurance Payment (include any mandatory property insurances. Hazard, flood, wind, etc.) \$
- 26 Monthly Homeowners Association/Condo Fee (if applicable) \$
- 27 What caused you to have difficulty making your payment
- | | |
|--|---|
| <input type="checkbox"/> Job relocation | <input type="checkbox"/> Payment increase on Adjustable Rate Mortgage |
| <input type="checkbox"/> Unemployment | <input type="checkbox"/> Medical bills or prolonged illness |
| <input type="checkbox"/> Reduction of income | <input type="checkbox"/> Victim of fraud |
| <input type="checkbox"/> Divorce or separation | <input type="checkbox"/> Death of spouse or family member |
| <input type="checkbox"/> Failure of a business | <input type="checkbox"/> Incarceration |
| <input type="checkbox"/> Military service | <input type="checkbox"/> Other <input type="text"/> |
- 28 Is the property abandoned, vacant, or condemned? Yes No
- 29 Is the property owner occupied? Yes No

Contact

During the review process it may be necessary for your loan specialist to contact you by phone.

- 30 What is the best phone number to reach you?
- 31 If the selected number is a cell phone number do we have your permission to contact you via the cell phone number? Yes No
- 32 When is the best time to contact you? Morning Afternoon Evening
- 33 Loan Number
- 34 Full Name
- Full Name - Co-Borrower
- 35 Submitted Date / /