



REO Agent: Lina Chu  
909-829-5111 (O)  
909-380-8615 (F)

## Financial Information Worksheet

Primary Contact: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
 Contact Telephone: \_\_\_\_\_ Fax #: \_\_\_\_\_  
**Estimated rate and payment Quote:**  
 1<sup>st</sup> Loan: \$ \_\_\_\_\_ %Rate: \_\_\_\_\_ PITI: \_\_\_\_\_ 2<sup>nd</sup> Loan: \_\_\_\_\_ %Rate: \_\_\_\_\_ PI: \_\_\_\_\_ Down: \_\_\_\_\_  
 Est. Total Options & Upgrades: \$ \_\_\_\_\_ **Type of Loan:** \_\_\_\_\_  
**Interest Only:** Yes / No **Expanded:** Yes / No **Documentation Type:** \_\_\_\_\_  
 Borrower Name: \_\_\_\_\_ Co-Borrower Name: \_\_\_\_\_  
 Address: \_\_\_\_\_ Address: \_\_\_\_\_  
 City: \_\_\_\_\_ Zip: \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_  
**Note: Less than 2 years at your current residence? If so, please provide all information on previous residence.**  
 Own / Rent Time Here: \_\_\_\_\_ yrs. \_\_\_\_\_ mo. Own / Rent Time Here: \_\_\_\_\_ yrs. \_\_\_\_\_ mo.  
 Status of Current Home: To Sell: Yes/ No To Rent: Yes/No To Use as 2<sup>nd</sup> Home: Yes/No  
 Home Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
 Work Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
 Social Security #: \_\_\_\_\_ Social Security #: \_\_\_\_\_  
 Borrower Fico Score: \_\_\_\_\_ Co-Borrower Fico Score: \_\_\_\_\_  
 Is Purchase Contingent upon selling your current home: Yes/ No  
 Is Purchase to be used as primary residence: Yes/ No Used as Investment: Yes/ No  
 Current Home Value: \_\_\_\_\_ Mortgage Balance: \_\_\_\_\_ Payment: \_\_\_\_\_ Taxes: \_\_\_\_\_ HOA: \_\_\_\_\_  
 Do You Own Other Properties: Yes/ No

### SOURCE OF DOWN PAYMENT AND CASH RESERVES:

Source of Down Payment:	Sale of Home	Savings	Gift/Other:
Bank Account: _____	_____	_____	_____
	Type of Account		Balance
Bank Account: _____	_____	_____	_____
	Type of Account		Balance
Stocks/ Bonds: _____	_____	_____	_____
	Type of Account		Balance
IRA/ 401K: _____	_____	_____	_____
	Type of Account		Balance

### EMPLOYMENT AND FINANCIAL INFORMATION:

Borrower:	Self Employed Yes/No	Co-Borrower:	Self Employed Yes/No
Current Employer: _____	_____	_____	_____
Street: _____	_____	_____	_____
City/State/Zip: _____	_____	_____	_____
Type of Business: _____	_____	_____	_____
Years with Employer: _____	_____	_____	_____
Position: _____	_____	_____	_____
Monthly Income: Base Salary: \$ _____ OT: \$ _____	_____	Base Salary: \$ _____ OT: \$ _____	_____
Bonus: \$ _____ Commission: \$ _____	_____	Bonus: \$ _____ Commission: \$ _____	_____
Total Debt: _____	_____	Total Debt: _____	_____
Front End Ratio: _____	_____	Back End Ratio: _____	_____

**Note: Less than 2 years at your current employment? If so, please provide all information on previous employment**

### AUTHORIZATION TO RELEASE CREDIT

I/we hereby authorize Countrywide Home Loans, hereinafter referred to as "lender", to verify my past and present employment earnings records, bank accounts, stock holdings, and any other asset balances needed to process my mortgage loan application. I further authorize lender to order a consumer credit report and verify other credit information. Necessary information may include, but not limited to, employment history, savings deposits, checking accounts, consumer credit balances, payments and history, including mortgage payment records and balances. The information to be obtained will be used by the lender and any federal agency insuring, guaranteeing or purchasing the mortgage to determine whether you qualify as a prospective borrower under lender's and the agency's underwriting standards, Countrywide Home Loans is hereby authorized to release any information required to complete the processing of such loan to (seller). This application is not an obligation or contract to buy or sell real estate. This is not a commitment to lend. You may accept a photocopy of this authorization in lieu of the original. THE UNDERSIGNED AUTHORIZED RELEASE OF INFORMATION AND REPRESENTS THAT ALL INFORMATION PROVIDED HEREIN IS TRUE AND CORRECT.

_____	_____	_____	_____
Borrower's Signature	Date	Co-Borrower's Signature	Date

Gretzel Hunt, Sales Manager  
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