



Mass Lic # MB3396
Make the Right Choice
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Mortgage Application

Date: _____ Application taken by: _____ How did you hear about us: _____

Name: _____ **Spouse:** _____ **Married-Single-Joint:** _____

Address: Own/Rent _____

Phone (H) _____ Cell: _____ Fax: _____ E-mail: _____

Date-Birth: _____ School Yrs: _____ Date-Birth: _____ School Yrs: _____

Ethnicity (B) _____ U.S.Citizen: _____ Ethnicity (Co) _____ U.S.Citizen _____

Self / Emp (B) _____ Self / Emp (Co) _____

Emp Address: _____ Emp Address: _____

Employer Phone: _____ Employer Phone: _____

Position: _____ Position: _____

Length Emp: _____ From _____ To _____ Length Emp: _____ From _____ To _____

Income Gross per Yr: _____ Per Month: _____ Income Gross per Yr: _____ per Month: _____

Soc Sec: # _____ Credit: (B) _____ Soc Sec: # _____ Credit: (Co) _____

Present Resident Info: Own/Rent: _____ Monthly \$ _____ Fee's \$ _____ Length: _____ From: _____ To: _____

Other Expenses: _____

Assets:

Checking: _____ Saving: _____

Stock: _____ IRA: _____

401K: _____ Other: _____

(1) Auto: Own Y/N _____ Make _____ Year _____

Price \$ _____ Loan \$ _____ When _____ Length _____

(2) Auto: Own Y/N _____ Make _____ Year _____



Purchase / Refinance home Info:

Purchase / Refinance address: _____

Type of home: SFR / Condo: _____ Year build: _____ Appraised value: _____ Purchase Date: _____

Purchase price: _____ Down payment: _____ Mortgage Amt / Balance: _____

Mortgage / Month: \$ _____ Fix-Arm-Yrs: _____ Real Estate Tax / Yr: _____ INS / Yr: _____

Tax Escrow: Y/N _____ Ins Escrow: Y/N _____ Have you ever filed bankruptcy: _____

Client proposal:

Fixed rate: _____ Years: _____ ARM: _____ Est. Monthly payment: _____

Purpose of new loan:

Purchase: _____ Refinance: _____ Cash out: amount: _____ Consolidation: _____ Out of ARM: _____

Listing Broker: _____ Contact: _____ Tel: _____

Selling Broker: _____ Contact: _____ Tel: _____

Comments: