



Phone: 302-854-0314
877-877-2372

Client Profile

FAX: 302-336-9696
302-258-0800

Achieving Your Financial Goal Is Our Goal !

Name _____ Social Security # _____ DOB _____

Name _____ Social Security # _____ DOB _____

Address _____ Length of time at this address _____

City _____ State _____ Zip _____

Phone # Home _____ Bus. _____ Fax _____

E-mail _____

Employment

Applicant - Employer: _____ Years: _____ Years in line of work: _____

Co-Applicant - Employer: _____ Years: _____ Years in line of work: _____

(If either applicant has worked less than two years at the current employer, please indicate prior employer in additional comments section.)

If self-employed, indicate type of business, how long in business and in this line of work: _____

Gross Annual Income

Borrower \$ _____

Co-Borrower \$ _____

Other* \$ _____

Total \$ _____

*Rental Income, Child Support, Alimony, etc.

Financial Assets

Checking \$ _____

Saving \$ _____

Stocks/Bonds \$ _____

Other (401K, IRA, Etc.) \$ _____

Gifts \$ _____

Total \$ _____

Any bankruptcies? _____

If so, what kind and date of discharge:

Real Estate

Home \$ _____

Investment \$ _____

Housing Costs

	<u>Monthly</u>	<u>Mortgage Balances</u>	<u>Interest Rate</u>
Mortgage/Rent Payment	\$ _____	\$ _____	_____
Taxes & Insurance	\$ _____		
Other Mortgage	\$ _____	\$ _____	
Other Taxes & Insurance	\$ _____		
Total	\$ _____	\$ _____	

Additional Comments:

I authorize the lender/broker to order a consumer credit report for the purposes of this financial profile.

Signed: _____