

PHONE

Kent Cty: 302-698-1099
Sussex Cty: 302-854-0314
Toll Free: 800-943-2781

Real Estate & Mortgages

Client Profile

FAX

Kent Cty: 302-336-9696
Sussex Cty: 302-258-0800

Achieving Your Financial Goal Is Our Goal !

Name _____ Social Security # _____

Name _____ Social Security # _____

Address _____

City _____ State _____ Zip _____

Phone # Home _____ Bus. _____ Cell: _____

E-mail _____ Fax _____

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 \$ _____

Value

Housing Costs

Mortgage/Rent Payment \$ _____ \$ _____
Taxes & Insurance \$ _____
Other Mortgage \$ _____ \$ _____
Other Taxes & Insurance \$ _____
Total \$ _____ \$ _____

Monthly Balances Interest Rate

Debts

Total Credit Card \$ _____ \$ _____
Auto Loans \$ _____ \$ _____
Installment Loans \$ _____ \$ _____
Other \$ _____ \$ _____
(Child Support, Alimony, Etc.)
Total \$ _____ \$ _____

Monthly Balances

Additional Comments:

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

Signed: _____