



5255 East Williams Circle, Suite 6000, Tucson, Arizona 85711
 520-750-8888 voice ■ 520-519-8051 facsimile
 BK#0902429

Refinance Mortgage Application

Borrower Name (First, Last)		Co-Borrower Name (First, Last)	
Social Security #	- -	Social Security #	- -
Date of Birth	/ /	Date of Birth	/ /
Current Address		Current Address	
How Long?	<input type="checkbox"/> Years <input type="checkbox"/> Months	How Long?	<input type="checkbox"/> Years <input type="checkbox"/> Months
Home Telephone:		Cell Phone:	
Email Address:		Email Address:	
Married?	<input type="checkbox"/> Y <input type="checkbox"/> N	Married?	<input type="checkbox"/> Y <input type="checkbox"/> N

Is Borrower married to Co-Borrower? Yes No

Borrower:

Co-Borrower:

Current Employer		Current Employer	
How Long?		How Long?	
<input type="checkbox"/> Hourly Wage:	\$. /hr	<input type="checkbox"/> Hourly Wage:	\$. /hr
Hours worked /wk		Hours worked /wk	
<input type="checkbox"/> Salary	\$ <input type="checkbox"/> Monthly <input type="checkbox"/> Annual	<input type="checkbox"/> Salary	\$ <input type="checkbox"/> Monthly <input type="checkbox"/> Annual
Do you have 2 years of employment in the same line of work?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have 2 years of employment in the same line of work?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Additional Income?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Additional Income?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Description:		Description:	
Amount of Add'l Income	\$ <input type="checkbox"/> Monthly <input type="checkbox"/> Annual	Amount of Add'l Income	\$ <input type="checkbox"/> Monthly <input type="checkbox"/> Annual

Bank Accounts:

Bank Name:		<input type="checkbox"/> Borr <input type="checkbox"/> Co-Borr	<input type="checkbox"/> Checking <input type="checkbox"/> Savings	Approximate Balance:	\$
Bank Name:		<input type="checkbox"/> Borr <input type="checkbox"/> Co-Borr	<input type="checkbox"/> Checking <input type="checkbox"/> Savings	Approximate Balance:	
Bank Name:		<input type="checkbox"/> Borr <input type="checkbox"/> Co-Borr	<input type="checkbox"/> Checking <input type="checkbox"/> Savings	Approximate Balance:	\$
Other Assets:	Type of Account:		Approximate Balance:		
			Borrower		Co-Borrower
	<input type="checkbox"/> 401K		\$		\$
	<input type="checkbox"/> IRA		\$		\$
	<input type="checkbox"/> Stocks/Bonds		\$		\$
	<input type="checkbox"/> Gift from Family Member		\$		\$
<input type="checkbox"/> Existing Home Equity Loan		\$		\$	

Real Estate Owned		
Do you own any other property?	<input type="checkbox"/> Y <input type="checkbox"/> N	If Yes, please list property address
	Property #1	Occupancy of Property
		<input type="checkbox"/> Primary Residence <input type="checkbox"/> 2 nd Home <input type="checkbox"/> Investment Property
		Is the property mortgaged? <input type="checkbox"/> Y <input type="checkbox"/> N
Approximate Value:	\$	If yes, How much is owed?
		\$
	Property #2	Occupancy of Property
		<input type="checkbox"/> Primary Residence <input type="checkbox"/> 2 nd Home <input type="checkbox"/> Investment Property
		Is the property mortgaged? <input type="checkbox"/> Y <input type="checkbox"/> N
Approximate Value:	\$	If yes, How much is owed?
If Rented out – how much?	\$ /month	\$
	Property #3	Occupancy of Property
		<input type="checkbox"/> Primary Residence <input type="checkbox"/> 2 nd Home <input type="checkbox"/> Investment Property
		Is the property mortgaged? <input type="checkbox"/> Y <input type="checkbox"/> N
Approximate Value:	\$	If yes, How much is owed?
If rented out – how much?	\$ /month	\$
I have additional properties: <input type="checkbox"/> Y <input type="checkbox"/> N		

Have you had a bankruptcy in the last 7 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Ch 7 <input type="checkbox"/> Ch 13
Have you had a property foreclosure/Deed-in-Lieu/Short Sale in the last 7 years?		<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you obligated to pay alimony, child support or separate maintenance?	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ /mo
Are you a U.S. Citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Are you a permanent resident alien w/ card?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Do you intend to occupy as your primary residence?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
How much rent are you currently paying?		\$
What is your comfort zone for a mortgage payment?		\$

Government Monitoring

***In order to ensure we do not discriminate for reasons of race or color, please complete the following information. Your selections will not impact the outcome of your qualification or programs available.**

Borrower	Co-Borrower
Ethnicity	Ethnicity
<input type="checkbox"/> Hispanic or Latino	<input type="checkbox"/> Hispanic or Latino
<input type="checkbox"/> Not Hispanic or Latino	<input type="checkbox"/> Not Hispanic or Latino
Race	Race
<input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> American Indian or Alaska Native
<input type="checkbox"/> Asian	<input type="checkbox"/> Asian
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Black or African American
<input type="checkbox"/> Native Hawaiian or Other Pacific Islander	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander
<input type="checkbox"/> White	<input type="checkbox"/> White

*Type of Property you will be refinancing:		<input type="checkbox"/> Primary Residence
		<input type="checkbox"/> 2 nd Home
		<input type="checkbox"/> Investment Property
*Would you like cash out?	<input type="checkbox"/> Yes	If yes, how much? \$
	<input type="checkbox"/> No	
*Do you have 1 st and 2 nd mortgages now?	<input type="checkbox"/> Yes	Would you like to pay off and close the 2 nd mortgage?
	<input type="checkbox"/> No	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
		Was the 2 nd mortgage obtained during the original purchase?
		<input type="checkbox"/> Yes
		<input type="checkbox"/> No
* What do you think the subject property is worth?	\$ _____	Yr. Property purchased: _____
What is your current interest rate?	% 1 st Mtg	% 2 nd Mtg
What are your goals for a refinance?	Please check all that apply:	
	<input type="checkbox"/> Lower rate	
	<input type="checkbox"/> Lower payment	
	<input type="checkbox"/> Shorten term	
	<input type="checkbox"/> Fix rate from adjustable	
	<input type="checkbox"/> Cash out	
Who did you speak with in our office?		
<input type="checkbox"/> Lance Dickson		
<input type="checkbox"/> Courtney Walker		
<input type="checkbox"/> Joette Meadows		
<input type="checkbox"/> Andrea Ayers		
<input type="checkbox"/> Missie Triano Walsh		
<input type="checkbox"/> Laura Galloway		