

Loan Qualification Worksheet and Requirements

Personal Info

Borrower #1 Name: _____ Preferred Name: _____
Age: _____ Kids #s/ages: _____
Home phone: _____ Cell: _____
Work phone: _____ Email: _____
Address: _____ Months: _____
Previous: _____ Months: _____
Preferred Communication: text email phone call fax

Borrower #2 Name: _____ Preferred Name: _____
Age: _____ Kids #s/ages: _____
Home phone: _____ Cell: _____
Work phone: _____ Email: _____
Address: _____ Months: _____
Previous: _____ Months: _____
Preferred Communication: text email phone call fax

Income #1

YTD income: _____
Last year's income: _____
Monthly income: _____
Employer Name: _____ Position: _____
Time on job: _____ Previous Employer / Time: _____
Self-employed? Y N Commission income Y N
Business expenses deducted on tax return Y N
Other monthly income: _____
Other: _____

Income #2

YTD income: _____
Last year's income: _____
Monthly income: _____
Employer Name: _____ Position: _____
Time on job: _____ Previous Employer / Time: _____
Self-employed? Y N Commission income? Y N
Business expenses deducted on tax return Y N
Other monthly income: _____
Other: _____

City/area: _____

Must-Haves (in order of priority):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Must-NOT Haves (in order of priority):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

What else:

Documents needed

- 2 months paystubs or YTD profit & loss for business
- 2 previous years federal tax returns plus all W2s, 1009s, W9s, and anything else
- 3 months statements – all pages – of any checking, savings, investment, retirement accounts
- Current mortgage statement for any properties owned
- Copies of drivers licenses
- Divorce decree
- Letter of explanation for all negative credit report items and inquiries

These can all be emailed, faxed, or DropBoxed, too!

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