

# Borrower's Financial Statement

Loan Number _____	Property Address _____
Borrower Name _____	Mailing Address _____
Social Security # _____	Home Phone _____
Home Listed for Sale? _____	Work Phone _____
Selling Agent _____	# of Dependents at this address _____
Agent's Phone # _____	# of Persons Living at this address _____
CoBorrower Name _____	Mailing Address _____
CoBorrower Social Security # _____	Home Phone _____
	Work Phone _____
Number of Cars Owned _____	
Have you contacted a Credit Counseling Service? _____	

Asset Type	Value	Income Information	Monthly Amount
Other Real Estate (estimated value)		Borrower & Co-bor. Salary/Wages (Gross)	
Checking Accounts		Disability, Unemployment (Gross)	
Savings/Money Market Accounts		Social Security (Gross)	
IRA/Keogh Accounts		Retirement/Annuity/Trust (Gross)	
401k/ESOP Accounts		Gross Rental Income (all properties)	
Stocks, Bonds, CD's		Child Support/Alimony	
Other Investments		Other Income	

Expenses	Monthly Amount	Monthly Amount	Monthly Amount
Net Rental Income (from investment properties)		2nd Mort. on Primary Residence	
Dependent Care		Credit Card(s) Payments	
Personal Loans		Car Payments	
Utilities		Other Credit Expenses	
Groceries		Mortgage for 2nd Home	
Medical Expenses		Child Support/Alimony	

Mortgage Payment Information on Primary Residence		If Property Taxes and Insurance are not escrowed:	
Primary Mortgage Pmt. (Principal & Interest)		Annual Property Taxes	
Monthly Property Tax Payment (if escrowed)		*Annual Property Insurance Premium	
*Monthly Property Insurance Pmt. (if escrowed)			
Primary Residence HOA Dues or Other Assessment			
Monthly Mortgage Insurance Payment			

\* Property insurance premiums should include Hazard, Flood and Earthquake

I (we) agree that the financial information provided is an accurate statement of my (our) financial status. I (we) understand and acknowledge that any action taken by the lender on my (our) behalf will be made in strict reliance on the financial information provided. My (Our) signature(s) below grants the holder of my (our) mortgage the authority to confirm the information I (we) have disclosed in this financial statement, to verify that it is accurate by ordering a credit report, and to contact my real estate agent and/or credit counseling service representative (if applicable).

Submitted this \_\_\_\_\_ day of \_\_\_\_\_

By: \_\_\_\_\_ Date: \_\_\_\_\_  
 Signature of Borrower

By: \_\_\_\_\_ Date: \_\_\_\_\_  
 Signature of CoBorrower

Before mailing, make sure you have signed and dated the form and attached a copy of your most recent paystub.  
 If you are self employed, attach a copy of your most recent Federal Tax Returns.