

## Home Owner Information Worksheet

Homeowner Name (A) \_\_\_\_\_

Co-Borrower/Spouse Name (B) \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zipcode \_\_\_\_\_

Co-Borrower Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zipcode \_\_\_\_\_

Property Address (if different) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zipcode \_\_\_\_\_

Home Phone (A) \_\_\_\_\_ Home Phone (B) \_\_\_\_\_

Work Phone (A) \_\_\_\_\_ Work Phone (B) \_\_\_\_\_

Cell Phone (A) \_\_\_\_\_ Cell Phone (B) \_\_\_\_\_

Email Address (A) \_\_\_\_\_

Email Address (B) \_\_\_\_\_

Homeowner SS# \_\_\_\_\_ Co-Borrower SS# \_\_\_\_\_

Homeowner Date of Birth \_\_\_\_\_ Co-Borrower Date of Birth \_\_\_\_\_

Homeowner Employer 1 \_\_\_\_\_

Title \_\_\_\_\_ How Long? \_\_\_\_\_

Homeowner Employer 2 \_\_\_\_\_

Title \_\_\_\_\_ How Long? \_\_\_\_\_

Co-Borrower Employer 1 \_\_\_\_\_

Title \_\_\_\_\_ How Long? \_\_\_\_\_

Co-Borrower Employer 2 \_\_\_\_\_

Title \_\_\_\_\_ How Long? \_\_\_\_\_

## Household Information

Number of Adults Over 18 \_\_\_\_\_

Number of Children \_\_\_\_\_ Ages \_\_\_\_\_

<b>Loan Information</b>	<b>First Mortgage</b>	<b>Second Mortgage</b>	<b>Third Mortgage</b>
Loan Number			
Name of Lender			
Monthly Payment			
Date of Loan			
Paid Through Date			
Delinquent Amount			
Outstanding Balance			
<b>Loan Type (indicate with an "X")</b>			
Sub-prime			
FHA			
VA			
Conventional with PMI			
Uninsured Conventional			
Rural Development			
Contract for Deed			
Other:			
<b>Loan Terms (enter your current interest rate under appropriate category)</b>			
Fixed Rate			
Adjustable Fate			
Hybrid ARM (2/28)			
Interest Only			
Option ARM			
40/30 Balloon			
80/20			
Deferred			
Balloon			
Other:			
<b>Escrow Account Info</b>			
Taxes Escrowed (Y/N)			
Delinquent tax amount			
Insurance Escrowed (Y/N)			
Delinquent insurance amount			





<b>Monthly Income</b>		<b>Gross Amount</b>	<b>Take Home</b>	<b>Verified</b>
Base Salary - Borrower 1				
Base Salary - Borrower 2				
Social Security				
Pension/Retirement				
Unemployment/Welfare				
Child Support				
Other				
		<b>Total Monthly Income (A)</b>		
<b>Monthly Expenses</b>		<b>Monthly Amount</b>		<b>Verified</b>
<b>Type</b>	<b>Description</b>			
Housing/Mortgage payment	1st Mortgage			
Housing/Mortgage payment	2nd Mortgage/HELOC			
Housing/Property taxes	(if not included in mortgage payment)			
Housing/Property insurance	(if not included in mortgage payment)			
Housing/Utilities	Electric			
Housing/Utilities	Garbage			
Housing/Utilities	Water/Sewer			
Housing/Utilities	Heating Fuel			
Housing/Home maintenance	Home Maintenance			
Housing/Miscellaneous	HOA Dues			
Telephone/Telecom	Basic Service			
Telephone/Telecom	Cell Phone			
Telephone/Telecom	Internet			
Auto/Transportation	Car Payments			
Auto/Transportation	Car Insurance			
Auto/Transportation	Gasoline and Oil			
Auto/Transportation	Car Maintenance/Registration			
Food	Groceries			
Food	Restaurants/Take Out			
Insurance	Life/Disability Insurance			
Health care	Doctor/Dentist Visits			
Health care	Medical Insurance			
Health care	Prescriptions			
Personal care	Clothing			
Personal care	Haircuts/Barber			
Children	Day Care/Tuition			
Children	Child Support Payments			
Children	School Lunches			
Continuing education	Books/Tuition			
Donations	Church/Charity			
Entertainment	Cable			
Entertainment	Cigarettes/Tobacco/Alcohol			
Entertainment	Fitness Membership			
Entertainment	Movies			
Pets	Food/Vet			
Liabilities/Credit cards	Credit Card Payments			
Liabilities/Credit cards	Installment/Personal Loans			
Liabilities/Credit cards	Student Loans			
Other				
		<b>Total Monthly Expenses (B)</b>		
		<b>Monthly Surplus/(Shortfall) (A - B)</b>		