



Mortgage Information Sheet

Date: _____ PCU Name: _____ Completed by: _____

Name: _____ Name: _____
First MI Last First MI Last
(Borrower) (Co-borrower)

Address: _____
Street City State Zip

Telephone: _____ Email: _____

Best time to contact: ☐ Morning ☐ Afternoon ☐ Evening

Borrower

Marital Status: ☐ Married ☐ Unmarried
(includes single, separated, divorced, widowed)

Birthdate: _____

Social Security #: _____

Employer: _____

How Long: _____ Annual Salary: _____

Co-Borrower

Marital Status: ☐ Married ☐ Unmarried
(includes single, separated, divorced, widowed)

Birthdate: _____

Social Security #: _____

Employer: _____

How Long: _____ Annual Salary: _____

Ethnicity: ☐ Hispanic or Latino ☐ Not Hispanic or Latino

Ethnicity: ☐ Hispanic or Latino ☐ Not Hispanic or Latino

Race: ☐ American Indian or Alaskan Native
☐ Black or African American
☐ Asian
☐ White
☐ Native Hawaiian or other Pacific Islander

Race: ☐ American Indian or Alaskan Native
☐ Black or African American
☐ Asian
☐ White
☐ Native Hawaiian or other Pacific Islander

Sex: ☐ Male ☐ Female

Sex: ☐ Male ☐ Female

I do not wish to furnish this information: ☐

I do not wish to furnish this information: ☐

Purpose of Loan: ☐ Purchase
☐ Refinance

Refinance Reason: ☐ Lower Rate / Term
☐ Home Improvement
☐ Consolidate Debt
☐ Cash-Out/Amount? _____

Approximate Value of Property: _____

Disclosures: (please select one)

- ☐ At Application Disclosures Attached
☐ At Application Disclosures mailed to member on _____.

Do you intend to Portfolio this loan? ☐ YES ☐ NO

What to Bring To Your Loan Application

Use the following checklist to be sure that you provide everything you may need to help make your loan application an easy, hassle-free experience.

- ☐ **Copy of Photo ID**
- ☐ **Paystubs for the last 30 days**
- ☐ **Original copies of your most recent 2 years W-2's**
- ☐ **If you have a rental property provide your most recent 2 years tax returns with all schedules and current rental agreement**
- ☐ **If you are self-employed or receive a 1099, provide your most recent 2 years tax returns with all schedules and a year-to-date profit and loss statement and balance sheet**
- ☐ **If you own 25% or more of a corporation, provide the most recent 2 years corporate tax returns with all schedules and a year-to-date profit and loss statement and balance sheet**
- ☐ **If you are commissioned, provide your most recent 2 years tax returns with all schedules and year-to-date employee business expenses**
- ☐ **Last 2 months' bank statement for all accounts, all pages, including blank pages**
- ☐ **Most recent retirement or 401k statements, all pages, including blank pages**
- ☐ **If divorced, all papers including marital termination agreement & final decree (signed and recorded by the court)**
- ☐ **Original certificate of eligibility and DD 214 (VA loans only)**
- ☐ **Information on Real Estate you currently own - Copy of your current mortgage statement or Tax bill and Insurance Declarations Page (if not paid through escrow)**
- ☐ **Purchase Contract (for the purchase of your new home – Be sure dates you are committing to are realistic)**
- ☐ **Sales Contract (if you are selling your present home)**
- ☐ **Certified copy of the closing statement (if you have already sold your home)**