

LOAN WORKSHEET

Broker/Realtor Name: _____

Broker/Realtor Phone: _____

Broker/Realtor Email: _____

NMLS#: Company _____ Agent: _____

Borrower: _____

Co-Borrower: _____

Home Address: _____

City: _____ State: _____ Zip: _____ County: _____

Home #: _____ Cell #: _____

LOAN TYPE: _____

LOAN AMOUNT: \$ _____

CASH-OUT AMOUNT: \$ _____

ESTIMATED VALUE: \$ _____

TERMS: _____

SUBJECT ADDRESS: _____

PROPERTY TYPE:

OCCUPANCY:

CURRENT LOAN INFO: _____ **Balance** _____ **Payment** _____ **Rate** _____

1st Trust Deed..... \$ _____ \$ _____ %

2nd Trust Deed..... \$ _____ \$ _____ %

3rd Trust Deed..... \$ _____ \$ _____ %

PURCHASE INFO: **-OR-**

Purchase Price: \$ _____ Down Payment: \$ _____

Purchase Agreement: Yes No

New Development: Yes No Approved Permits: Yes No

Cost Estimates: \$ _____ Time Estimates: _____

FINANCIAL:

Liquid Assets: \$ _____ 401k: \$ _____

Stocks/Bonds/CD: \$ _____ Other: \$ _____