

## Pre-Qualification Worksheet

Complete this worksheet before your pre-qualification appointment

Borrower Name: \_\_\_\_\_ Social Sec #: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_ Home Phone: (    ) \_\_\_\_\_  
 \_\_\_\_\_ Work Phone: (    ) \_\_\_\_\_  
 CoBorrower: \_\_\_\_\_ Social Sec #: \_\_\_\_\_

Real Estate Agent: \_\_\_\_\_ Phone (    ) \_\_\_\_\_  
 Real Estate Firm: \_\_\_\_\_

### Employment (past two years)

Circle One*	Name of Employer	Address	Dates Employed	Current or Ending Monthly Salary
B / C				
B / C				
B / C				
B / C				

\*For each entry, indicate B for borrower, or C for coborrower

### Other Income Sources

Circle One	Income Source	Monthly Amount
B / C		
B / C		
B / C		
B / C		

Examples include Rental, Retirement, Disability, Trust Funds, Social Security

### Bank Accounts - savings, checking, etc.

Financial Institution	Acct Number	Type of Account	Estimated Balance

### Residence History (past two years)

Circle Owned or Rented for each residence

Circle One	Name of Landlord (indicate Self if owned)	Address	Dates Owned or Rented
Owned / Rented			
Owned / Rented			
Owned / Rented			
Owned / Rented			

**Credit Cards - department stores, banks, etc.**

Name of Lender	Acct Number	Monthly Payment	Estimated Balance Due

**Loan Information - car, student, etc.**

Name of Lender	Acct Number	Monthly Payment	Estimated Balance Due

**Remember to bring the following items with you:**

Recent payroll stub(s) from employer or profit/loss statement and 2 years tax return if self-employed.

Statements on other assets that may be used to verify your eligibility

e.g. Stock/Bond funds or information on other real estate you own.

If you are applying for a VA loan, bring your Certificate of Eligibility from the Veteran's Administration, or your discharge papers (form DD214).

If you've made an offer that was accepted, also bring a copy of the Purchase and Sale Agreement and the Homeowner association fee estimate (if applicable).