

Pre-qualification Analysis Worksheet

Provided by Shelter Mortgage Company



Borrower Information

Borrower 1: (first, MI, last)				Borrower 2: (first, MI, last)			
Nickname:		Married?		Nickname:		Married?	
S.S. #:		DOB:		S.S. #:		DOB:	
Address:				Address:			
Prev. Addr. (if less than 2 yrs at current address)				Prev. Addr. (if less than 2 yrs at current address)			
Home #:				Home #:			
Work #:				Work #:			
Cell #:				Cell #:			
E-mail:				E-mail:			

Employment Information

Employer:		Employer:	
Job Title:		Job Title:	
Start Date:		Start Date:	
Mo. Gross Income:	(if not salaried, please explain)	Mo. Gross Income:	(if not salaried, please explain)
Other Income:	(please explain)	Other Income:	(please explain)

Questions

Please list approx. amount of liquid assets (checking, savings, etc.)			
Please list approx. amount of investment assets (stocks, bonds, etc.)			
Please list approx. amount of retirement assets (401K, 403b, IRA, etc.)			
Who referred you to Shelter Mortgage?			
Do you rent or own your current residence?	<input type="checkbox"/> Own	<input type="checkbox"/> Rent	If rent, how much per month?
If own, what is the estimated value of your home?			
If own, how much do you owe on any mortgage(s)?			
How much money do you want to put down on a new home?			
Will you be receiving a gift from anyone for part of your down payment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
What price range do you want to buy in?			
What is your maximum desired monthly mortgage payment?			
How long do you estimate you will own this home?	<input type="checkbox"/> Less than 5 yrs	<input type="checkbox"/> 5-10 years	<input type="checkbox"/> 10+ years
What area of town are you primarily looking in?			
What type of property are you most interested in?	<input type="checkbox"/> Single-family	<input type="checkbox"/> Condo	<input type="checkbox"/> Townhome
Is any borrower a US veteran?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Is any borrower required to pay alimony or child support?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Monthly Amnt? <input type="text"/>
Do you authorize us to obtain a credit report to fully complete your pre-qualification?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

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