



## Information Sheet

This Information Sheet will help us establish where you are now and where you want to be. This information is confidential and will be used for the sole purpose of preparing mortgage financing options for your review.

### **About You**

Your Name _____	Social Security Number _____
Co-Borrower's Name _____	Social Security Number _____
Address _____	How Long? _____ Rent \$ _____
City _____	State _____ Zip Code _____
Day Time Phone Number _____	Evening Phone Number _____
Cell Phone Number _____	E-Mail Address _____

*If less than two years at current address:*

Previous Address _____	How Long? _____
City _____	State _____ Zip _____

### **Current Employment**

Borrower's Employer _____	Salary _____	How Long? _____
Job/Position Title _____		
Co-Borrower's Employer _____	Salary _____	How Long? _____
Job/Position Title _____		

*If less than two years at current employer:*

Borrower's Previous Employer _____	Salary _____	How Long? _____
Co-Borrower's Previous Employer _____	Salary _____	How Long? _____

Self-Employed? YES NO Business Entity? Sole Proprietor Partnership Corporation S-Corporation

Commission? YES NO Bonus? YES NO Overtime? YES NO

### **About Your Debts/Monthly Obligations**

Creditor	Minimum Payment	Balance
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Debts Continued . . . .

Do you have student loans? YES NO Are they in deferment? YES NO (If yes, for how long? \_\_\_\_\_)

Do you pay child support? YES NO (If yes, ages of child(ren) \_\_\_\_\_)

Do you pay alimony? YES NO (If yes, for how long? \_\_\_\_\_)

**About your Credit History**

How would you rate your credit history? (circle one)

Excellent          Good          Good With Some Late Payments          Not Good          I Don't Know

Have you ever filed for Bankruptcy or had a home foreclosure? YES NO

**Liquid Assets**

Savings Accounts \$ \_\_\_\_\_ Checking Accounts \$ \_\_\_\_\_

Is there family gift money available? YES NO (If yes, how much? \_\_\_\_\_)

401K/Deferred Comp/IRA's/Mutual Funds/Other \$ \_\_\_\_\_

**Miscellaneous Information**

Are you a Veteran? YES NO

**Purchase Insurance – if applicable**

Are you actively looking for a new home? \_\_\_\_\_

Are you working with a Realtor? \_\_\_\_\_

What is your “comfort” payment? (include property taxes and insurance) \$ \_\_\_\_\_

What type of home are you interested in? Single Family          Duplex          Condominium

How long do you intend to own the new home? \_\_\_\_\_

Mortgage program preference: Fixed    Adjustable    Balloon    Interest Only    Fixed/Adjustable hybrid

Sale Price \$ \_\_\_\_\_ Property Address: \_\_\_\_\_

Property Taxes \$ \_\_\_\_\_ Down Payment \$ \_\_\_\_\_

**Refinance Information – if applicable**

Current balance on 1<sup>st</sup> mortgage \$ \_\_\_\_\_ Current balance on 2<sup>nd</sup> mortgage \$ \_\_\_\_\_

Current property taxes \$ \_\_\_\_\_ Current house insurance premium/due date \$ \_\_\_\_\_

Estimated value of your home \$ \_\_\_\_\_ What is your current interest rate? \_\_\_\_\_

**New Construction – if applicable**

Do you own the lot? YES NO Is the lot free and clear of any liens? YES NO

Do you have a builder? YES NO Do you need construction financing or is it builder funded? \_\_\_\_\_

Contract Price \$ \_\_\_\_\_ Estimated months to complete: \_\_\_\_\_

**Your Financial Goals Are:**

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**CONSENT:** I/We hereby give my/our consent to have Capitol National Bank, or any credit reporting bureau which it may designate, obtain any and all information concerning my/our employment, checking and/or savings accounts, obligations, and all other credit matters which they may require in connection with my/our application for a loan, in order to help me/us establish my/our current purchasing power.

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Date

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Date