



Client 1:

Client 2:

Contact Email address1:

Contact Email address2:

Home Phone number

Cell

Current Address:

How long have you lived at this address? (Years, Months)

What cities are you looking to purchase a property?

What Type of Property?

*House      Condo      Townhome      Manufactured Home      Other*

Have you owned a home in the last 3 years?      *Yes*      *No*

Are you looking for a fixer?      *Yes*      *No*

(if yes) Do you want to finance the repairs into your loan?      *Yes*      *No*

Many programs require some down payment from the borrower.

How much do you have for a down payment?

Is this a gift?      *Yes*      *No*

Are these funds in your bank account now?      *Yes*      *No*

What purchase price do you want to qualify for?

**Please complete and fax back to 858-764-2835**

What is the maximum monthly payment you are comfortable with including property taxes, homeowner's insurance, and HOA dues? \_\_\_\_\_

What is your current monthly rent? \_\_\_\_\_

Are you eligible for a VA loan? Yes / No

Client 1 Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Client 2 Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Current Employer 1: \_\_\_\_\_

Job Title: \_\_\_\_\_

Years on job \_\_\_\_\_ Years in this line of work \_\_\_\_\_ Yrs in School \_\_\_\_\_

Current Employer 2: \_\_\_\_\_

Job Title: \_\_\_\_\_

Years on job \_\_\_\_\_ Years in this line of work \_\_\_\_\_ Yrs in School \_\_\_\_\_

Dependents \_\_\_\_\_ Ages \_\_\_\_\_

Year, Make and approx value of Autos \_\_\_\_\_

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We need to run your credit report to pre-approve your home loan. The cost is approx \$18.00 per couple. Please provide your credit card information below:

Visa/MasterCard# (circle one) \_\_\_\_\_

Expir Date \_\_\_\_\_ CCV# \_\_\_\_\_

Exact name on card \_\_\_\_\_

Billing address \_\_\_\_\_

Client Signature \_\_\_\_\_

We need the following documents for your loan approval:

- 1) Last 2 paystubs for all employment
- 2) Last 3 years of federal tax returns (all pages) and W-2's/1099's
- 3) Last 2 months bank statements for all accounts (all pages)
- 4) Copy of Driver's License and Social Security Card
- 5) Copy of current retirement statement and/or stocks, mutual funds, etc.
- 6) Current Landlord's name and phone number
- 7) Copy of legal documents for child support/ alimony income (if applicable)

The above items may be emailed to [heidi@affinity-financial.com](mailto:heidi@affinity-financial.com)

Faxed to my direct fax at 858-764-2835

Mailed or Delivered to 10650 Treena St #103

San Diego, CA 92131

I look forward to working with you!

Heidi Lawler

Direct line 858-693-5401

