

Pre-qualification Application Worksheet

Borrower (B1): _____ Email: _____ Phone#: _____
SS#: _____ DOB: _____ Marital Status: _____
Address: _____ City: _____ State: _____ Zip: _____
Ownership Status: _____ Since: _____
Prior Address if less than 2 years: _____

Co-Borrower (B2): _____ Email: _____ Phone#: _____
SS#: _____ DOB: _____ Marital Status: _____
Address: _____ City: _____ State: _____ Zip: _____
Ownership Status: _____ Since: _____
Prior Address if less than 2 years: _____

Loan Details:

Loan Amount: \$ _____ Property Value: \$ _____ Escrow T &/or I: _____ Term: _____ Purpose: _____

Property Details:

Address: _____ City: _____ State: _____ Zip: _____
Type: _____ Construction Type: _____ How Titled: _____

Income:

B1 Employer: _____ S/E? _____ Position: _____ Start Date: _____
Income: _____ per _____ Salaried or Hourly
Prior or Additional Employer: _____ Position: _____ Start Date: _____ End Date: _____
Income: _____ per _____ Salaried or Hourly
Other Income Source: _____ Amount _____ Per Month

B2 Employer: _____ S/E? _____ Position: _____ Start Date: _____
Income: _____ per _____ Salaried or Hourly
Prior or Additional Employer: _____ Position: _____ Start Date: _____ End Date: _____
Income: _____ per _____ Salaried or Hourly
Other Income Source: _____ Monthly Amount _____

Assets:

Bank: _____	Account Type: _____	Balance: _____
Bank: _____	Account Type: _____	Balance: _____
Bank: _____	Account Type: _____	Balance: _____
Other: _____	Type: _____	Amount: _____

Liabilities (Monthly Amts):

Alimony: _____ Child Support: _____ Separate Maintenance: _____ Other: _____

Real Estate Owned:

Address: _____ City: _____ State: _____ Zip: _____
Value: _____ Occupancy: _____ Status: _____ Ins: \$ _____ Taxes: \$ _____ Assoc Fee: \$ _____
Mortgage Type: _____ Creditor Name: _____ Mo. Pmt.: _____ Balance: _____

Notes: _____

I/We authorize Shelby State Bank to run a credit report for the purpose of a mortgage loan.

Borrower _____ Co-Borrower _____ Date: _____

Mortgage Prequalification Application Checklist

By providing the following information, we will be able to advise you more quickly on your ability to be prequalified for a mortgage:

- Your last two years W-2 Forms.
- Your most recent month of pay stubs.
- If self-employed, your last two years of personal and business federal tax returns.
- If receiving Social Security, Disability or pension income, your award letter, or the prior year 1099 form, AND two months of proof of payment.
- Last two months of your bank statements for your checking and savings accounts.
- Your most recent investment account complete statement showing the present value.
- If you own any real estate, a copy of the annual tax bills for the most recent year and the homeowner's insurance costs.
- A copy of your driver's license or state identification and an additional identification card.