



"We Walk You Home"

PLEASE PRINT THIS FORM, COMPLETE IT, AND FAX IT TO (719)0447-0575

Client Organizer

Client Name: _____ **Date:** _____

Thank you for your confidence in PrimeSource Mortgage. Please complete this organizer with accurate and current information. This data will be the basis for all your loan paperwork so it is very important. **(For multiple choice questions, please circle the appropriate response.)**

One of the first steps in the loan process is to obtain a credit report for yourself and your co-borrower. This helps us find the best loan for your circumstances. It also allows us to accurately determine your monthly debt payments. From this information we begin to structure your loan by determining your debt to income ratio as well as other calculations.

For this reason it is necessary to ask you to sign and return the attached **Borrowers Signature Authorization.**

Documents that PrimeSource Mortgage must have to process your loan

Current Mortgage Statement with Loan # and Phone # (Refi)
Current Insurance Statement with Name and Phone # of agent
2 Current Pay Stubs
W-2s- Years 2002
Tax Returns 2002
2 Months Bank Statements
Existing Survey if possible (Refi only)
Appraisal Fee approx \$400
Copies of most recent statements of Mutual Funds, 401K, CDs, other
Financial Assets, etc

Borrower Information

Name: _____ Soc. Sec.#: _____

Home Phone: _____ Date of Birth: _____ Yrs. School: _____

Marital Status: _____ # Dependents: _____ Ages: _____

Present Address:

Street: _____ Own? Rent?

City: _____

State/Zip: _____ How Long? _____

(If less than 2 years at current address complete the following:)

Previous Address:

Street: _____ Own? Rent?

City: _____

State/Zip: _____ How Long? _____

If you are currently renting please provide the following information for purposes of confirming your rental history:

Landlord's Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Borrower Employment Information

Name & Address of current Employer:

Street: _____ Yrs. On this job: _____

City: _____ Yrs. In this line of work: _____

State/Zip: _____ Are you self employed: _____

Position/Title: _____ Business Phone: _____

Monthly Income: _____

If employed less than two years at current employer, complete the following:

Name & Address of previous Employer:

Street: _____ Dates (from/to): _____

City: _____ Monthly income: _____

State/Zip: _____ Were you self employed? _____

Position/Title: _____ Business Phone: _____

Co-Borrower Information

Name: _____ Soc. Sec.#: _____

Home Phone: _____ Date of Birth: _____ Yrs. School: _____

Marital Status: _____ # Dependents: _____ Ages: _____

Present Address:

Street: _____ Own? _____ Rent? _____

City: _____

State/Zip: _____ How Long? _____

(If less than 2 years at current address complete the following:)

Previous Address:

Street: _____ Own? _____ Rent? _____
City: _____
State/Zip: _____ How Long? _____

Co-Borrower Employment Information

Name & Address of current Employer:

Street: _____ Yrs. On this job: _____
City: _____ Yrs. In this line of work: _____
State/Zip: _____ Are you self employed: _____
Position/Title: _____ Business Phone: _____
Monthly Income: _____

If employed less than two years at current employer, complete the following:

Name & Address of previous Employer:

Street: _____ Dates (from/to): _____
City: _____ Monthly income: _____
State/Zip: _____ Were you self employed? _____
Position/Title: _____ Business Phone: _____

Assets

<u>Description of Asset</u>	<u>Amount</u>
Checking Account (Please provide Bank Name).....\$ _____	
C.D.s	_____
Stocks/Bonds/Mutual Funds	_____
Retirement Account	_____
Autos (Year, Make & Model) Approx. Value.....	_____
Personal Property (Approx. replacement value)	_____
Real Estate Owned	_____

Please fax this form back to us as soon as possible at (719) 447-0575

Or better yet, bring it in to us in person. Let's get started!

PrimeSource Mortgage
3604 Galley Rd Suite 102
Colorado Springs, CO 80909
www.colorado-springs-mortgages.com

If you have questions, please call (719) 447-0570

Again, thank you for choosing PrimeSource Mortgage. We look forward to walking you home.