

"We Walk You Home"

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

<u>Client Organizer</u>

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

Type of Mortgage and Term of Loan

Type of Mortgage y	ou are conside	ering	VA	FHA	Conv	entio	nal O	ther_	
Amount of Loan:				Years	of Loa	n:10	15	20	30
Amortization Type:	Fixed ARM	Other	:			Wai	ive E	scrow	/s?
Property Informati	ion and Purpo	se of Lo	oan						
Address of Property	to be finance	d:							
Street									
City									
State, Zip									
When was the home	e built (that you	ı are fin	ancing)?					
Legal Description of	f Property to b	e financ	ed (if a	availabl	e):				
Purpose of Loan:	Purchase	Rate &	a Term	Refinan	ce	Cor	nstruc	tion	
	Cash Out Rei	linance	Const	truction	to Peri	mane	nt		
Property will be:	Primary Resi	dence	Secor	nd Home	9	Inve	estme	ent Pr	operty
<u>If this is a Refinanc</u>	e <i>Loan:</i> Year	Acquire	ed			_			
	Origi	nal Cos	t						
	Amt.	of existi	ng lien	ls		-			
Title to the Property deed):	will be held in	ı what n	iame o	r names	(exact	ly as	you v	vant i	t on the

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 Lon	g?
(If less than 2 years at o	current address complet	te the following:)
Previous Address:		
Street:	Own?	Rent?
City:		
State/Zip:	How Lon	g?
If you are currently renting plea purposes of confirming your rer	-	g information for
Landlord's Name:		
Address:		
City: State:	Zip:	

Borrower Employment Information

Name & Address of current Empl	oyer:
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 Em	ployer:
	_ 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 Employ Street:	yer: Yrs. On this job:			
City:	Yrs. In this line of work:			
State/Zip:	Are you self employed:			
Position/Title:	Business Phone:			
Monthly Income:	_			
<i>If employed less than two years at current employer, complete the following:</i> Name & Address of previous Employer:				
Street:	Dates (from/to):			
City:	Monthly income:			
State/Zip:	Were you self employed?			
Position/Title:	Business Phone:			

<u>Assets</u>

Description of Asset	<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	

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

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.