

FOR REFINANCE

BLUE LEAD SHEET - PROSPECT INFORMATION

L.O. NAME _____ PHONE # _____

PRINT CLEARLY AND FILL IN EVERY LINE EITHER W/INFO OR MARK LINES N/A ACCORDINGLY

NAME _____ SPOUSE NAME _____ DATE OF CALL _____

ADDRESS _____ UNIT # _____

CITY _____ ZIP CODE _____ COUNTY _____

HOME PH # _____ WORK # _____ CELL # _____

DATE PURCHASED _____ PURCHASE PRICE \$ _____

PRESENT VALUE \$ _____ CURRENT INTEREST RATE _____ %

IS IT FIXED / ADJUSTABLE – DATE IT ADJUST _____ PRE PAY PENALTY Y / N

BALANCE \$ _____ MONTHLY PAYMENT \$ _____ PI / PITI

2nd MORTGAGE OR LINE OF CREDIT INTEREST RATE _____ % FIXED / ADJUST

BALANCE \$ _____ PAYMENT \$ _____ ORIG. DATE _____

other types of debt, credit cards medical bills, student loans, personal loans, automotive loans

TOTAL CREDIT CARD DEBT - BALANCE \$ _____ PAYMENT \$ _____

TYPE OF DEBT/LOAN _____ BALANCE \$ _____ PAYMENT \$ _____

TYPE OF DEBT/LOAN _____ BALANCE \$ _____ PAYMENT \$ _____

MAJOR PURCHASE &/or HOME IMPROVEMENT PLANS _____

ESTIMATED COST OR CASH WANTED \$ _____

HAVE YOU CONSIDERED REFINANCING? IF YES WHY? _____

BORROWER'S OCCUPATION _____ YRS ON JOB _____ INCOME \$ _____

CO-BORROWER'S OCCUPATION _____ YRS ON JOB _____ INCOME \$ _____

SELF EMPLOYED Y / N HOW LONG _____ NET INCOME \$ _____

CREDIT [1 to 10 w/10 best] _____ ANY SLOW PAYS / BK Y / N / DISCHARGE DATE _____

BORROWER FULL NAME _____ SSN _____

BORROWER DATE OF BIRTH _____ YEARS OF SCHOOL _____

CO-BORROWER NAME _____ SSN _____

CO-BORROWER DATE OF BIRTH _____ YEARS OF SCHOOL _____

REMARKS _____

APPT. SET: DAY OF _____ DATE _____ TIME _____ AM/PM –

OFFICE / HOME

RESET APPT. DAY OF _____ DATE _____ TIME _____ AM/PM –

OFFICE / HOME