

NEW LEAD INTAKE FORM

Referral Source: _____

Date _____

Borrower Name: _____

Marital Status: Married Unmarried

Dependents / Age(s) _____

SSN: _____

DOB: _____

Cell # _____

Other # _____

Email: _____

Own or Rent – Lease up? _____

Borrower Address:

Previous Address (if less than 2 Years at Current):

Desired Move Date _____

Budget Pmt (PITI) \$ _____

Budgeted Cash to closing table \$ _____

Source (Must document where your money has been for the last 60 days) _____

Gift - Plan _____

Borrower Employer: _____

Address: _____

Title: _____ Business Type: _____

How Long: _____ Start Date _____

Hourly _____ **Hours** _____ **Salary** _____

1099 _____ **Bonus** _____ **Commission** _____

Tips _____ **Variable** _____

Previous Employer (if needed):

Start date _____ End Date _____

2nd job? (Must be 2 year history on both)

Start date _____ End Date _____

Child Support Rec _____ Pay _____

Alimony Rec _____ Pay _____

Court Ordered Y / N

US Citizen or Permanent Resident

Military Branch: _____ Rank: _____ 1st time use Y / N

Are you on Title to any other properties or Land Parcels?

Financed? _____ Escrow? Yes No

Taxes _____ Insurance _____ HOA _____

Tentative Property:

FTHB **Primary** **Investment** **2nd Home**

Program: _____ **Down Payment:** _____

Property Type: _____

Sale Price: _____ **Offer Price:** _____

HOA: _____ **Seller Pd Closing Costs:** _____

Co-Borrower Name: _____

Marital Status: Married Unmarried

Dependents / Age(s) _____

SSN: _____

DOB: _____

Cell # _____

Other # _____

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