

Prospect Summary

I. Prospect Information

Borrower Name _____ SSN _____ H Phone # _____
 E-Mail _____ Cell / Alt # _____ B Phone # _____
 Birthday _____ Fax # _____

Co-Borrower Name _____ SSN _____ H Phone # _____
 E-Mail _____ Cell / Alt # _____ B Phone # _____
 Birthday _____ Fax # _____

Present Address _____ Personal Interests _____
 _____ Children's Info. _____

II. Property Information

Property Address _____

Occupancy Status Primary Residence Sales Price _____
 Second Home Down Payment/Equity _____
 Investment Property Appraised Value _____

III. Mortgage Information

Note Information

Loan Amount _____
 Note Rate _____
 Term (in months) _____
 Due (in months) _____
 Monthly Payment _____

Lien Position

First
 Second
 Loan Program: _____
 Loan Rep: _____

IV. Underwriting Information

Qualifying Ratios		Loan-to-Value Ratios		Total Income
Primary Housing Expense/Income	_____ %	LTV	_____ %	Total House Exp _____
Total Obligations/Income	_____ %	Total LTV	_____ %	Other Payments _____

V. Contact Information

Contact Date	Time	Memo
_____	_____	_____
_____	_____	_____
_____	_____	_____

Source: _____

Comments: