

# PRE-QUAL SUBMISSION SHEET (BORROWER)

## BORROWER'S INFORMATION

First Name	MI	Last Name	SS Number	Date of Birth	
Present Address		City	State	Zip	Years
Home Telephone		Cell Phone		Work Phone	
Property Address if Different		City	State	Zip	

## EMPLOYMENT

Present Employer Name (If Self Employed Check Here O)	City	State	Years on Job
Employers Address	City	State	Zip
Present Position			

<input type="radio"/> Owner Occupied <input type="radio"/> 2 <sup>nd</sup> Home <input type="radio"/> Investment	Can Borrower Provide W2's And Pay stubs	Y	N
	Can Borrower verify at least 2 years Employment	Y	N
	Are you in an ARM mortgage	Y	N

If ARM what ARM program \_\_\_\_\_ when does it adjust \_\_\_\_\_

Are you behind on payments      Y      N      If yes how many months \_\_\_\_\_

Has the Notice of Default been filed?    Y      N      N/A    If filed what date? \_\_\_\_\_

Do you have a Foreclosure sale date?    Y      N      N/A    If yes what is the date? \_\_\_\_\_

Have you ever been late on your mortgage in the last 12 months Y      N    If yes how many months \_\_\_\_\_

Who are your current Lenders?    1<sup>st</sup> \_\_\_\_\_ Balance \$ \_\_\_\_\_ Rate \_\_\_\_\_ %

2<sup>nd</sup> \_\_\_\_\_ Balance \$ \_\_\_\_\_ Rate \_\_\_\_\_ %

3<sup>rd</sup> \_\_\_\_\_ Balance \$ \_\_\_\_\_ Rate \_\_\_\_\_ %

Your signature on this document gives **M3 Strategy, Inc. or assignees** the authority to order a credit report and to release information to Mortgage Lender/Broker Involved in the handling of your mortgage application.

**ALL APPLICANT'S INFORMATION IS KEPT CONFIDENTIAL AND SECURE**

\_\_\_\_\_  
BORROWER'S SIGNATURE

\_\_\_\_\_  
DATE



# INCOME/EXPENSE WORKSHEET

## ASSETS

Description	Borrower	Co-Borrower	Total
Checking Account	\$	\$	\$
Savings Account	\$	\$	\$
Cash	\$	\$	\$
Certificates of Deposits (CD's)	\$	\$	\$
Stocks/Bonds/Mutual Funds	\$	\$	\$
401K/IRA/Retirement Account	\$	\$	\$
Primary Home	\$	\$	\$
Other Real Estate	\$	\$	\$
Automobile 1	\$	\$	\$
Automobile 2	\$	\$	\$
Other Assets	\$	\$	\$
		Total Net Value Assets	\$

## MONTHLY INCOME

Description	Borrower	Co-Borrower	Total
Gross Income	\$	\$	\$
Overtime	\$	\$	\$
Commissions/Bonuses (calculate to Monthly)	\$	\$	\$
Rental Income	\$	\$	\$
Other Income/Specify CHILD SUPPORT/ALIMONY/RENTAL, OTHER	\$	\$	\$
Less: Federal Income Tax	(\$ )	(\$ )	(\$ )
State Income Tax	(\$ )	(\$ )	(\$ )
Other	(\$ )	(\$ )	(\$ )
<b>Monthly Net Income</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

Borrower Signature: \_\_\_\_\_

Date:

Co-Borrower Signature: \_\_\_\_\_

Date:

## MONTHLY EXPENSES

Description Of Expense	Monthly Payment	Total Balance Due	Months Remaining
PRIMARY Mortgage 1	\$	\$	
PRIMARY Mortgage 2	\$	\$	
RENTAL Mortgage 1	\$	\$	
RENTAL Mortgage 2	\$	\$	
PRIMARY Property Tax	\$	\$	
RENTAL Property Tax	\$	\$	
Homeowners Insurance	\$	\$	
Flood/Windstorm/Earthquake Insurance	\$	\$	
Automobile Loan 1	\$	\$	
Automobile Loan 2	\$	\$	
Automobile Insurance	\$	\$	
Automobile Maintenance	\$	\$	
Gasoline/parking	\$	\$	
Other Loans	\$	\$	
Credit Cards (Visa, MC, Dept Store...)	\$	\$	
Utilities: (electricity, gas, water, trash, etc.)	\$	\$	
Cellular Phone	\$	\$	
Medical/Dental/Life Insurance	\$	\$	
Medical expense (Not covered by Ins)	\$	\$	
Groceries/Food/Toiletries	\$	\$	
Entertainment/Vacation	\$	\$	
Child Care	\$	\$	
School Tuition	\$	\$	
Alimony/Child Support	\$	\$	
Clothing	\$	\$	
Other	\$	\$	
<b>Total Expense</b>	<b>\$</b>	<b>\$</b>	

Borrower Signature: \_\_\_\_\_

Date:

Co-Borrower Signature: \_\_\_\_\_

Date: