



Mortgage Loan Questionnaire

I. Terms of Loan & Property Information:

Purchase Price of subject property	
Loan Amount	
Subject Property Address	
Estimated Real Estate Taxes	
Year Built	
Single Family, CO-OP, or condo?	
Primary or Secondary Residence	
REFINANCES: Year Acquired	
Original Purchase Price	
Current Market Value	

II. Borrower (s) Information

Borrower

Name	
Social Security Number	
Home Phone Number	
Date of Birth	
Years of School	
Married, Unmarried or Separated	
Present Address (include city, state & zip)	
Years at present address?	
Former Residence (need 2 years history)	
# of Dependents & Ages	
Preferred-e-mail	

Co-Borrower

Name	
Social Security Number	
Home Phone Number	
Birth Date	
Years of School	
Married, Unmarried or Separated	
Present Address (if Same as Borrower leave blank)	
Former Residence (if same as Borrower leave blank)	

III. Employment Information

Borrower

Name of Employer	
Complete Address of Employer	
Self Employed? Yes or No	
Years on this job	
Years in this line of work	
Position or Title	
Business Phone Number	
Former Employer	
Former Employer's Address	
Dates (from – to)	
Former Employer phone number	

Co-Borrower Employment Information

Name of Employer	
Complete Address of Employer	
Self Employed Yes or No	
Years on this job	
Years in this line of work	
Position or Title	
Business Phone	
Former Employer	
Former Employer's Address	
Dates (from – to)	
Former Employers phone number	

Monthly Income & Present Housing Expense

Gross Monthly Income	Borrower	Co- Borrower	Present Housing Expense	Total
Base Monthly Salary			Rent	
Overtime			First Mortgage	
Bonuses			Second Mortgage	
Commissions			Hazard Insurance	
Dividends / Interest			Real Estate Taxes	
Net Rental Income			Other (main, H.O.A fees)	
Other Income			Total	

**** It is very important that you give us your Hazard Insurance, Real Estate tax, and Maintenance or common charges information. (FOR REFINANCE)**

Assets

Liquid Assets

Financial Institution	Type of Account	Amount Deposited

Other Assets

Real Estate Owned (Market Value)	
Vested in Retirement Fund	
Net Worth of Business	
Automobiles owned (make & year)	
Other assets	
Other assets	

VII. Schedule of Real Estate Owned

Property Address	Type	Market Value	Amount of Mortgage & Liens	Mortgage Payments	Insurance Main, tax & misc.

Declarations

* Instructions – All answers are already marked with the answer “No”, If your answer to the questions below are “yes” please remove the “x” from the “No” box and put a “x” in the “Yes” box.

Borrower Co-Borrower

Questions	Yes	No	Yes	No
Are there any outstanding judgements against you?				
Have you been declared bankrupt in the past 7 years?				
Have you had a property foreclosed upon or given title or deed in lieu thereof in the last 7 years?				
Are you a party to a lawsuit?				

Have you directly or indirectly been obligated on any loan, which resulted in foreclosure, transfer of title in lieu of foreclosure, or judgement?				
Are you presently delinquent or in default on any Federal debt or any other loan, mortgage, financial obligation, bond or loan guarantee?				
Are you obligated to pay alimony, child support, or separate maintenance?				
Is any part of the down payment borrowed?				
Are you a co-maker or endorser on a note?				

Question	Yes	No	Yes	No
Are you a U.S. citizen?				
Are you a permanent resident alien?				
Do you intend to occupy the property as your primary residence?				
Have you had an ownership interest in a property in the last three years?				
What type of property did you own – principal residence (PR), Second Home (SH), or investment property (IP)?				
How did you hold title to the home – solely by yourself (S), with your spouse (SP), or jointly with another person (O)?				

Name, Phone of your Attorney	
Name, Real Estate Agent & Phone #	

**Instructions – Please print and fax or re-save and email cbabcock@mortgagemasterinc.com
Fax 914-206-9641**

Mortgage Application Instructions

Please complete the mortgage questionnaire, re-save it and email it back to your loan officer. In order to provide you with a quick decision on your loan application, the following additional items are needed. Below is a checklist for your convenience. Please provide copies.

All Transactions

- Photo ID
- Two current and consecutive pay stubs for each borrower. If you do not receive pay stubs, Please provide a letter verifying your year to date income for 2006
- 2008 & 2009 W-2 Forms
- 2008 & 2009 Federal tax returns, with all pages and schedules, including any K-1's, partnerships and S-Corporations.
- Two months of your recent asset statements. Including all bank, brokerage, IRA, and retirement statements. All pages.

Purchase Transactions

- Copy of executed contract of sale including any addendum's and riders. Signed by all parties, with all changes initialed.
- if you are purchasing a coop, please provide the last two (2) years financial statements for the cooperative project.

Refinance Transactions

New York COOP

- Copy of your proprietary lease and stock certificate.
- you're last two years of COOP financial statements.

NY, NJ, CT Single Family Residence

- Copy of your original title policy and survey ****Save Money****
- Copy of your homeowner's insurance dec. page with paid receipt.
- Copy of your most recent mortgage and equity line statement. Also Send over 3rd lien statement.

New York Condo

- Copy of original title policy
- Copy of building master insurance policy