

**New Key Financial  
Loan Worksheet  
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<b>PERSONAL DATA</b>	<b>DECLARATIONS: Please Answer Y or N</b>
<b>Borrower:</b> _____ DOB: _____	<b>1.</b> Are there any outstanding judgements against you?
Social Security #: _____ Years in School: _____	
Home Phone: _____ Cell: _____	<b>2.</b> Have you declared bankruptcy within the past 7 years?
E-mail: _____	
<b>Co-Borrower:</b> _____ DOB: _____	<b>3.</b> Have you had a property foreclosed upon or given title deed in the lien thereof?
Social Security #: _____ Years in School: _____	
Home Phone: _____ Cell: _____	<b>4.</b> Are you party to a lawsuit?
E-mail: _____	
<input type="checkbox"/> Married (Including Registered Domestic Partner)	<b>5.</b> Have you directly or indirectly been obligated on any loan which resulted in foreclosure, transfer of title in lieu of foreclosure of judgment?
<input type="checkbox"/> Unmarried (Including Single, Divorced, Widowed)	
<input type="checkbox"/> Separated	<b>6.</b> Are you currently delinquent or in default on any federal debt of any other loan, mortgage, financial obligation, bond, or loan guarantee?
Number of Dependents: _____ Ages: _____	
Present Address: _____	<b>7.</b> Are you obligated to pay alimony, child support or separate maintenance?
City: _____ State: _____ Zip Code: _____	
<input type="checkbox"/> Own <input type="checkbox"/> Rent: \$ _____ How Long: _____	<b>8.</b> Is any of the down payment borrowed?
Prior Address: (If at present address less than 2 years)	
City: _____ State: _____ Zip Code: _____	<b>9.</b> Are you a co-maker or endorser of a note?
<input type="checkbox"/> Own <input type="checkbox"/> Rent: \$ _____ How Long: _____	
If Purchasing, Source of Down Payment: _____	<b>10.</b> Are you a U.S. citizen?
If Refinancing: _____ Year Built: _____	
Bedrooms: _____ Bathrooms: _____ Sq. Ft.: _____	<b>11.</b> Are you a permanent resident alien?
	<b>12.</b> Do you intend to occupy the property as your primary residence?
	<b>13.</b> Have you had ownership/interest in a property in the last 3 years?
	<b>14.</b> Do we have permission to run your credit?
<b>BORROWER EMPLOYMENT</b>	<b>CO-BORROWER EMPLOYMENT</b>
Employer: _____ <input type="checkbox"/> Self Employed	Employer: _____ <input type="checkbox"/> Self Employed
Address: _____	Address: _____
City: _____ State: _____ Zip Code: _____	City: _____ State: _____ Zip Code: _____
Position: _____	Position: _____
Phone: _____ Gross Monthly Income: \$ _____	Phone: _____ Gross Monthly Income: \$ _____
Start Date: _____	Start Date: _____
<b>PRIOR EMPLOYMENT (if current employment less than 2 yrs)</b>	<b>PRIOR EMPLOYMENT (if current employment less than 2 yrs)</b>
Employer: _____ <input type="checkbox"/> Self Employed	Employer: _____ <input type="checkbox"/> Self Employed
Address: _____	Address: _____
City: _____ State: _____ Zip Code: _____	City: _____ State: _____ Zip Code: _____
Position: _____	Position: _____
Phone: _____ Gross Monthly Income: \$ _____	Phone: _____ Gross Monthly Income: \$ _____
Start Date: _____ End Date: _____	Start Date: _____ End Date: _____
<b>BORROWER LIQUID ASSETS</b>	<b>CO-BORROWER LIQUID ASSETS</b>
Institution: _____ Balance: \$ _____	Do you have separate accounts from borrower? <input type="checkbox"/> Yes <input type="checkbox"/> No
Institution: _____ Balance: \$ _____	Institution: _____ Balance: \$ _____
401K: \$ _____ IRA: \$ _____	401K: \$ _____ IRA: \$ _____
Stocks/Bonds: \$ _____ Retirement: \$ _____	Stocks/Bonds: \$ _____ Retirement: \$ _____

# REAL ESTATE OWNED

## PROPERTY 1

Address:

City:	State:	Zip Code:
Property Type: <input type="checkbox"/> House <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Units <input type="checkbox"/> Building <input type="checkbox"/> Land	No. of Acres:	
Property Status: <input type="checkbox"/> Current Residence <input type="checkbox"/> 2nd Home <input type="checkbox"/> Rental Property	Rental Income: \$	
Market Value: \$	Purchase Price: \$	Year Acquired:
Mortgage Balance: \$	Payment: \$	
Taxes: \$	Insurance: \$	HOA: \$
Are taxes & insurance included in payment?		

## PROPERTY 2

Address:

City:	State:	Zip Code:
Property Type: <input type="checkbox"/> House <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Units <input type="checkbox"/> Building <input type="checkbox"/> Land	No. of Acres:	
Property Status: <input type="checkbox"/> Current Residence <input type="checkbox"/> 2nd Home <input type="checkbox"/> Rental Property	Rental Income: \$	
Market Value: \$	Purchase Price: \$	Year Acquired:
Mortgage Balance: \$	Payment: \$	
Taxes: \$	Insurance: \$	HOA: \$
Are taxes & insurance included in payment?		

## PROPERTY 3

Address:

City:	State:	Zip Code:
Property Type: <input type="checkbox"/> House <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Units <input type="checkbox"/> Building <input type="checkbox"/> Land	No. of Acres:	
Property Status: <input type="checkbox"/> Current Residence <input type="checkbox"/> 2nd Home <input type="checkbox"/> Rental Property	Rental Income: \$	
Market Value: \$	Purchase Price: \$	Year Acquired:
Mortgage Balance: \$	Payment: \$	
Taxes: \$	Insurance: \$	HOA: \$
Are taxes & insurance included in payment?		

## PROPERTY 4

Address:

City:	State:	Zip Code:
Property Type: <input type="checkbox"/> House <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Units <input type="checkbox"/> Building <input type="checkbox"/> Land	No. of Acres:	
Property Status: <input type="checkbox"/> Current Residence <input type="checkbox"/> 2nd Home <input type="checkbox"/> Rental Property	Rental Income: \$	
Market Value: \$	Purchase Price: \$	Year Acquired:
Mortgage Balance: \$	Payment: \$	
Taxes: \$	Insurance: \$	HOA: \$
Are taxes & insurance included in payment?		

## PROPERTY 5

Address:

City:	State:	Zip Code:
Property Type: <input type="checkbox"/> House <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Units <input type="checkbox"/> Building <input type="checkbox"/> Land	No. of Acres:	
Property Status: <input type="checkbox"/> Current Residence <input type="checkbox"/> 2nd Home <input type="checkbox"/> Rental Property	Rental Income: \$	
Market Value: \$	Purchase Price: \$	Year Acquired:
Mortgage Balance: \$	Payment: \$	
Taxes: \$	Insurance: \$	HOA: \$
Are taxes & insurance included in payment?		

## PROPERTY 6

Address:

City:	State:	Zip Code:
Property Type: <input type="checkbox"/> House <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Units <input type="checkbox"/> Building <input type="checkbox"/> Land	No. of Acres:	
Property Status: <input type="checkbox"/> Current Residence <input type="checkbox"/> 2nd Home <input type="checkbox"/> Rental Property	Rental Income: \$	
Market Value: \$	Purchase Price: \$	Year Acquired:
Mortgage Balance: \$	Payment: \$	
Taxes: \$	Insurance: \$	HOA: \$
Are taxes & insurance included in payment?		