



This is not an application or a commitment to lend. The purpose of this document is to facilitate an inquiry to determine if a customer would likely qualify for credit based on stated information. Additional factors and information is required to apply for a mortgage loan. Ask your loan officer for details.

RLO Name and NMLS #:  
 RLO Email:  
 RLO Office Address:  
  
 RLO Phone #:  
 Lender NMLS #: 407249

## PRE-QUALIFICATION INQUIRY WORKSHEET

### BORROWER INFORMATION

Name (First, Middle, Last): \_\_\_\_\_  
 Present Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 County of Residence: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ | Cell Phone: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 DOB: \_\_\_\_\_ | Marital Status: \_\_\_\_\_  
 Social Security Number: \_\_\_\_\_  
  
 Farm Involvement (Part-time/Full-Time/Non-Farmer): \_\_\_\_\_  
 Year Began Farming: \_\_\_\_\_ SIC Code/Crop: \_\_\_\_\_  
 Owner Operation: \_\_\_\_\_

### CO-BORROWER INFORMATION

Name (First, Middle, Last): \_\_\_\_\_  
 Present Address: \_\_\_\_\_  
 City, State, Zip: \_\_\_\_\_  
 County of Residence: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ | Cell Phone: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 DOB: \_\_\_\_\_ | Marital Status: \_\_\_\_\_  
 Social Security Number: \_\_\_\_\_  
  
 Farm Involvement (Part-time/Full-Time/Non-Farmer): \_\_\_\_\_  
 Year Began Farming: \_\_\_\_\_ SIC Code/Crop: \_\_\_\_\_  
 Owner Operation: \_\_\_\_\_

### INCOME INFORMATION

W-2 Income: \$ \_\_\_\_\_  
 Dividends & Interest: \$ \_\_\_\_\_  
 Alimony & Child Support: \$ \_\_\_\_\_  
 Pension/ Retirement: \$ \_\_\_\_\_  
 Social Security & Disability: \$ \_\_\_\_\_  
 Gross Rental Income: \$ \_\_\_\_\_ Net Rental Income: \$ \_\_\_\_\_  
 Gross Business Income: \$ \_\_\_\_\_ Net Business Income: \$ \_\_\_\_\_  
 Gross Farm Income: \$ \_\_\_\_\_ Net Farm Income: \$ \_\_\_\_\_  
  
 Primary Wage Earner:

### INCOME INFORMATION

W-2 Income: \$ \_\_\_\_\_  
 Dividends & Interest: \$ \_\_\_\_\_  
 Alimony & Child Support: \$ \_\_\_\_\_  
 Pension/ Retirement: \$ \_\_\_\_\_  
 Social Security & Disability: \$ \_\_\_\_\_  
 Gross Rental Income: \$ \_\_\_\_\_ Net Rental Income: \$ \_\_\_\_\_  
 Gross Business Income: \$ \_\_\_\_\_ Net Business Income: \$ \_\_\_\_\_  
 Gross Farm Income: \$ \_\_\_\_\_ Net Farm Income: \$ \_\_\_\_\_  
  
 Primary Wage Earner:

### LOAN DETAILS

Loan Purpose:  Purchase  Construction  
 For What:  Primary Residence  Lot  Recreational Lot  Rental  Vacation/Second Home  
 Term:  10yr  15yr  20yr  25yr  30yr  
 Rate:  Fully Fixed OR Convertible products:  15/30  10/30  5/30  3/30  1/30  Capped Variable  
 Approximate Purchase Price: \$ \_\_\_\_\_ Loan Amount Requested: \$ \_\_\_\_\_ Down Payment: \$ \_\_\_\_\_  
 Type of Property for Collateral: \_\_\_\_\_ Estimated Taxes & Ins. (Annual): \_\_\_\_\_  
 Collateral Value of Real Estate: \$ \_\_\_\_\_ ◀◀ **DO NOT PROVIDE** for Refinance



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Borrower Name:  
 Date:

**Assets** (Value in Dollars)

Cash, Checking, Savings, Money Market		
Financial Institutions (check one)	\$	_____
<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> MM	\$	_____
<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> MM	\$	_____
<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> MM	\$	_____
<input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> MM	\$	_____
<b>Total Liquid Assets</b>	\$	_____
Primary Residence <b>DO NOT PROVIDE</b> for Refinance ▶▶	\$	_____
Other Real Estate <b>DO NOT PROVIDE</b> for Refinance ▶▶	\$	_____
Lot <b>DO NOT PROVIDE</b> for Refinance ▶▶	\$	_____
Commercial <b>DO NOT PROVIDE</b> for Refinance ▶▶	\$	_____
Farm <b>DO NOT PROVIDE</b> for Refinance ▶▶	\$	_____
Residential <b>DO NOT PROVIDE</b> for Refinance ▶▶	\$	_____
Retirement Accts.	\$	_____
	\$	_____
Automobiles (Make/Year & Value)	\$	_____
	\$	_____
	\$	_____
	\$	_____
Other Assets (Itemize)	\$	_____
Farm Equipment	\$	_____
Livestock	\$	_____
	\$	_____
	\$	_____
	\$	_____
<b>Total Assets</b>	\$	_____

**Liabilities**

<u>Creditor</u>	<u>Monthly Pmt</u>	<u>Unpaid Balance</u>
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
Credit Card Pmt	\$ _____	\$ _____
	\$ _____	\$ _____
	\$ _____	\$ _____
Automobile Pmt	\$ _____	\$ _____
	\$ _____	\$ _____
Rent or Mtg Pmt	\$ _____ (w/tax & ins)	\$ _____
	\$ _____ (w/tax & ins)	\$ _____
	\$ _____ (w/tax & ins)	\$ _____
	\$ _____ (w/tax & ins)	\$ _____
401K Loan	\$ _____	\$ _____
Child Support/Alimony	\$ _____	\$ _____
<b>Total Liabilities</b>	<b>\$ _____</b>	<b>\$ _____</b>

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_