



PRE-MORTGAGE QUESTIONNAIRE

Client Name(s) _____

Date (MM/DD/YYYY) _____

Referred by _____

Mortgage Pre-Screen Questionnaire

When it comes to home loans or refinancing, there are so many variables - different terms, down payments, special circumstances, fixed or adjustable rates, just to name a few.

The good news is that those variables will allow us to tailor a home loan that's a perfect fit for you and your budget. Thank you for considering Haus Mortgage for your mortgage needs.

Below are a few questions we will ask to ensure we provide the best solution for you.

General Questions

What type of transaction are you looking for? Purchase Refinance

What loan amount are you looking for? \$ _____

How will you be purchasing? Alone Jointly

Credit

When was the last time you had your credit scores pulled? (Date: MM/YYYY) _____

Do you remember what your scores were? _____

If not, how do you feel your credit is rated? _____

Have you incurred any late payments over 30 days in the last 12 months? Yes No

Do you have any of the following:

- Collections Judgments Liens Recent Delinquencies Bankruptcy Foreclosures

Financial Information

How long have you been in your current job or industry? _____

Commission based earnings and self-employment require a minimum of 2 full years of tax returns in order to qualify

How much are you comfortable spending on housing per month? \$ _____

Current Monthly Payments:

Student Loans \$ _____

Auto Loans \$ _____

Minimum Credit Card Payments \$ _____

Personal Loans \$ _____

Are you responsible for any alimony, child support or maintenance? Yes No

Do you receive alimony/child support? Yes No

For Refinancing Only

How much do you think your home is worth? \$ _____

Has it been appraised in the last couple of years? Yes No

When did you purchase your home? _____

What was the purchase price? \$ _____

Do you have a second mortgage on your home? Yes No

What are your annual property taxes? \$ _____

How much is your homeowners insurance? \$ _____

Agent contact:

Name _____ Phone Number _____

Do you have any association fees due? Yes No

If yes, how much? \$ _____

Have you done any major improvements to your home?

Kitchen _____

- Bathrooms _____
- Any room additions (Did you get a permit).? _____
- Are there any major repairs that need to be done? _____

NOTES: