

Preliminary Loan Application

Waterstone Mortgage Group, LLC

484 East Carmel Drive, Suite 303

Carmel, Indiana 46032-2812

Tel: 317.566.8799 ♦ Fax: 317.566.8798

www.waterstone-mortgage.com

Date: _____

Loan Consultant: _____

Borrower

- Name: _____ SS#: _____
- Date of Birth: _____
- Current Address: _____
- City, State: _____ Zip: _____ - _____
- Rent or Own? : _____ Years at this address: _____ (If less than 2 years need former address)
- Former Address (if applicable): _____
- City: _____ State: _____ Zip Code: _____
- Monthly Gross Income: \$ _____ Years at Job: _____
- Self-Employed or W-2? : _____ Title: _____
- Company Name: _____
- Company Address: _____
- Former Employer Name (if less than 2 years at current): _____
- Former Employer Address: _____
- Former Employer City: _____ State: _____ Zip Code: _____
- Former Employer Gross Monthly Income: \$ _____ Title: _____
- Home Phone: _____ Cell: _____
- Work: _____ Fax: _____
- Email: _____

Co-Borrower

- Name: _____ SS#: _____
- Date of Birth: _____
- Monthly Gross Income: \$ _____ Years at Job: _____ Title: _____
- Company Name: _____
- Company Address: _____
- Phone: _____ Cell: _____
- Work: _____ Fax: _____

Purchase

Subject Property Address: _____

City: _____ State: _____ Zip Code: _____

Purchase Price: \$ _____ Down Payment: \$ _____

Property Value: \$ _____

Refinance

Mortgage Balance: \$ _____ 2nd Mortgage (if applicable): \$ _____ (payoff or resubordinate?)

Current rate: _____ Term: _____ Payment: \$ _____ Escrows: Yes or No

Taxes: \$ _____ Insurance: \$ _____ PMI: \$ _____ Home Owners Assoc. Dues: \$ _____

Year Home Built: _____ Purchase Price: \$ _____

Year Acquired: _____ Type of Home: _____ Rural, Suburban, or Urban: _____

Assets

- Automobiles: _____
- Checking/Savings: _____
- Life Insurance: _____
- Alimony/Child Support: _____
- 401K: _____
- Stocks/Bonds: _____
- CDs: _____