

Loan Intake Form

MORTGAGE / HELOC

Loan Details

General Objective/ Purpose of Loan

Property Type

Property Use

Address/ Location
(City & State)

Purchase Price or Estimated Value of
Property for Refi/ HELOC

Current Debt on Property

Desired Loan/ Line Amount

Loan Type

Interested in Relationship Pricing?

Unique Details of Request
(property type, quick closing, etc)

Client Details

Primary Income Type			
Annual Income (including recurring bonuses)	2024:	2023:	2022:
Liquid Assets			
Other Real Estate Owned	Location:	Use:	Monthly Obligation:
Property 1			
Property 2			
Property 3			
Other Debt (include only non-credit card debt with monthly obligations of \$100 or more)			
Unique Client Details (irregular income, bad credit, assets held in irrevocable trust, etc.)			