



PREQUALIFICATION FORM

REFERRED BY: _____

Thank you for taking the time to complete the important information below. We will use this information to review your qualifications for a mortgage that best suits your individual needs. By completing this form, it in no way obligates you to do business with SBCU and/or American Family Funding and is not a commitment to lend money. We look forward to the opportunity to serve you and please do not hesitate to contact us at (310) 374-3436 or SBCU@southbaycu.com.

Purpose of Loan: <input type="checkbox"/> Purchase \$ _____ <input type="checkbox"/> Refinance\$ _____				Property will be: <input type="checkbox"/> Primary Residence <input type="checkbox"/> Secondary Residence											
Term requested: _____				<input type="checkbox"/> Investment											
Borrower				BORROWER INFORMATION				Co-Borrower							
Borrower's Name (include Jr. or Sr. if applicable)								Co-Borrower's Name (include Jr. or Sr. if applicable)							
Social Security #		Home Phone #		Cell Phone #		DOB (m/d/y)		Social Security #		Home Phone #		Cell Phone #		DOB (m/d/y)	
Email Address: _____								Email Address: _____							
<input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Unmarried (single, divorced, widow)								<input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Unmarried (single, divorced, widow)							
Present Address <input type="checkbox"/> Own <input type="checkbox"/> Rent _____No. Yrs. (street, city, state, ZIP)								Present Address <input type="checkbox"/> Own <input type="checkbox"/> Rent _____No. Yrs. (street, city, state, ZIP)							
Additional Properties Owned: <input type="checkbox"/> 2 nd Home <input type="checkbox"/> Investment (street, city, state, ZIP)								Additional Properties Owned: <input type="checkbox"/> 2 nd Home <input type="checkbox"/> Investment (street, city, state, ZIP)							
Name & Address of Employer								Name & Address of Employer							
Position/Title/Type of Business				Business Phone				Position/Title/Type of Business				Business Phone			
Years with Employer				Years in Profession				Years with Employer				Years in Profession			
INCOME and ASSETS															
Gross Monthly Income				Borrower		Co-Borrower		Bank Accounts/Investments (Borrower & Co-borrower Combined)							
Base Employ. Income*				\$		\$		Checking				\$			
Overtime				\$		\$		Savings				\$			
Bonuses				\$		\$		Stocks/Bonds				\$			
Commissions				\$		\$		Retirement				\$			
Dividends/Interest				\$		\$		Other				\$			
Net Rental Income				\$		\$		Other				\$			
Other				\$		\$		Other				\$			
Total				\$		\$		Total				\$			
LIABILITIES															
Current Debts / Lender Attach any additional debt on a separate page				Monthly Payment & Months to Pay				Unpaid Balance				Will any part of the down payment be borrowed? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Real Estate Loan(s)				\$ Payment/Months				\$				Additional information that may be needed to qualify for a loan:			
Additional Real Estate Loan(s) on 2 nd or Investment Property				\$ Payment/Months				\$							
Auto Loan				\$ Payment/Months				\$							
Credit Card(s)				\$ Payment/Months				\$							
Other Loan(s)				\$ Payment/Months				\$							
Alimony/Child Support/Separate				\$ Payment/Months				\$							

AUTHORIZATION

SBCU and/or American Family Funding or its consultants to aid in a valid pre-qualification review may obtain verification, or re-verification, of any of the information above, including a tri-merge credit report, at any time. This information may be obtained either directly, or through a third party verification (i.e. credit reporting agency, employer, etc), and the original(s) and/or certified copies of the original(s) of these findings will be retained SBCU and/or American Family Funding.

I/We certify that the information herein is true and accurate to the best of our knowledge as of the date signed.

Borrower

Co-Borrower