



**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](mailto:SBCU@southbaycu.com).

<b>Purpose of Loan:</b> <input type="checkbox"/> Purchase \$ _____ <input type="checkbox"/> Refinance\$ _____				<b>Property will be:</b> <input type="checkbox"/> Primary Residence <input type="checkbox"/> Secondary Residence							
<b>Term requested:</b> _____				<input type="checkbox"/> Investment							
<b>Borrower</b>				<b>BORROWER INFORMATION</b>				<b>Co-Borrower</b>			
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 <sup>nd</sup> Home <input type="checkbox"/> Investment (street, city, state, ZIP)				Additional Properties Owned: <input type="checkbox"/> 2 <sup>nd</sup> 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					
<b>INCOME and ASSETS</b>											
<b>Gross Monthly Income</b>		<b>Borrower</b>		<b>Co-Borrower</b>		<b>Bank Accounts/Investments (Borrower &amp; Co-borrower Combined)</b>					
Base Employ. Income*	\$	\$	\$	Checking	\$	\$	\$				
Overtime	\$	\$	\$	Savings	\$	\$	\$				
Bonuses	\$	\$	\$	Stocks/Bonds	\$	\$	\$				
Commissions	\$	\$	\$	Retirement	\$	\$	\$				
Dividends/Interest	\$	\$	\$	Other	\$	\$	\$				
Net Rental Income	\$	\$	\$	Other	\$	\$	\$				
Other	\$	\$	\$	Other	\$	\$	\$				
<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>Total</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>				
<b>LIABILITIES</b>											
<b>Current Debts / Lender</b> Attach any additional debt on a separate page		<b>Monthly Payment &amp; Months to Pay</b>		<b>Unpaid Balance</b>		<b>Will any part of the down payment be borrowed?</b> <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 <sup>nd</sup> 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**