



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