

Pre-Application Consultation

1. Full Legal Name: _____

SSN: _____

DOB: _____ Married _____ Single _____ Divorced _____

Dependents ages _____

2. Primary Phone: _____

Email: _____

3. Current Address (with City & Zip): _____

Own: _____ Rent: _____ Payment: _____ Time at this Address: _____

Prior Address (If less than 2 years at current): _____

4. Current Employer: _____

Job Title: _____

Time at Current Employer: _____

Yearly Salary (Gross Income): _____

Prior Employer (If less than 2 years at current): _____

Time at prior employer: _____

5. Down-Payment Amount: _____ or Percentage _____ %

6. Other Income/Obligations (Child Support/Alimony): \$ _____

7 Do you own other properties? _____ Monthly payments? _____

Property addresses _____

8. ***New Property Information*** (Purchase price range/Condo or Single Family)

9. Referred for Approval by: _____

10. Authorization to pull Credit Report (sign and date) - We will accept Digital Signature if clicked

Have you filed bankruptcy in the past 7 years? Yes _____ No _____

Have you had property foreclosed on, short sale or Deed-in-lieu of foreclosure? Yes _____ No _____

Are you currently obligated to pay Alimony, Maintenance or Child Support? Yes _____ No _____

Are you a U.S. citizen? _____ If not do you have a Green Card? _____

Commonly required documents needed for approval.

Most recent paystubs for last 30 days

2020 & 2021 W2s

Two months most recent statements from where the down payment is coming from (include all pages)

Self Employed Documents

2020 & 2021 Business tax returns

2020 & 2021 personal tax returns

Year to date profit and loss statement

Retired Employees

Pension or Social Security Benefits Letter

1099-R Most recent Tax Year

Please fax/email back to The Rogers Team at (773) 328-1525 or RogersTeam@rate.com