

**Personal Finance Statement of:**

Borrower		Spouse or Co-Borrower	
Social Security Number		Social Security Number	
DOB		DOB	
Employer		Employer	
Employer address		Employer address	
Employer Phone		Employer Phone	
Position Held		Position Held	
Time in Position		Time in Position	

Property Address		Mailing Address	
Daytime phone		Evening Phone	
Email address			
Lender 1st mtg		Lender 2nd mtg	
Loan #		Loan #	

2 Months bank statements

2 Years tax returns

2 Most recent pay stubs

Third party authorization form ( included )

Hardship letter can be hand written  
Do you currently reside in the subject property?

Yes\_\_\_\_\_ No\_\_\_\_\_

Is this your primary property or rental?

Primary\_\_\_\_\_ Rental\_\_\_\_\_

Monthly Income	Amount \$\$	Monthly Expenses	Amount \$\$
Salary Borrower		Primary Home Mortgage	
Salary co-Borrower		Taxes / Insurance	
Bonus/Commissions		Rent payment / Other	
Interest/Dividends		Utilities(water/elec/gas)	
Soc Sec/ Retirement		Phone/cable/internet	
Rental/Partnership income		Groceries	
Soc Sec/ Retirement		Dry Cleaning/Clothing	
other / investment income		School Tuition/child care	
		Alimony/child support	
		auto loan / Insurance	
		Gas (car)	
		Car Maint/monthly parking	
		Credit Cards	
		Installment/other loans	
		other monthly expenses	

**Total Income**

**Total expenditures**

Assets	Value	Debt Analysis summary	\$\$\$
Checking		discretionary income(net monthly income minus expenses)	
savings			
stocks		Debt to income ratio (monthly exp + monthly net income)	
other assets			
real property		Total balance in 401K/IRA	
		Cash/Liquid on Hand	

\_\_\_\_\_  
Mortgagor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Mortgagor

\_\_\_\_\_  
Date