

Michael Chesser, CPA, Your Mortgage Consultant for Life
"Quick Start" Mortgage Form

Borrower Information	Co-Borrower Information
(Print) Name: _____	(Print) Name: _____
Social Security# _____	Social Security# _____
Home # _____ Work# _____	Home # _____ Work# _____
Present Address: _____	Present Address: _____
City: _____ State: _____ Zip: _____	City: _____ State: _____ Zip: _____
Age: ___ Yrs in School: _____ Marital Status: _____	Age: ___ Yrs in School: _____ Marital Status: _____
Rent ___ Own ___ #Yrs _____ Payment \$ _____	Rent ___ Own ___ #Yrs _____ Payment \$ _____
Employer: _____	Employer: _____
Title: _____ Start Date: _____	Title: _____ Start Date: _____

Income & Assets					
Gross	Borrower	Co-Borrower	Approx Balances	Borrower	Co-Borrower
Monthly Salary	_____	_____	Checking	_____	_____
Avg Overtime	_____	_____	Savings	_____	_____
Bonus	_____	_____	CDs-	_____	_____
Commission	_____	_____	Stocks-	_____	_____
Other	_____	_____	Bonds	_____	_____
			401Ks -	_____	_____
			IRAs	_____	_____

Monthly Debts		
	Monthly Payment	Approx Balance
Credit Cards	\$ _____	\$ _____
Vehicle Loans	\$ _____	\$ _____
Retail Cards	\$ _____	\$ _____
Other Loans	\$ _____	\$ _____
Child Support / Alimony	\$ _____	\$ _____

Important Information and Permission Agreement	
1. The property being considered for financing will be: Primary Residence ___ Second Home ___ Investment 2. Purchase ___ or Refinance ___ 3. Value of home or purchase price _____ 4. If Refinance, your current rate? _____ 5. Desired loan amount? _____ 6. Can you document your income? Yes ___ No ___ 7. U.S. Citizen? Yes ___ No ___ 8. Ever had foreclosure or Bankruptcy? Yes ___ No ___ 9. Other Notes: _____ _____ _____	I/We understand that this form is for pre-qualification only and is not a complete application. I/We authorize William Gregory Mortgage to obtain a credit report on all borrowers named herein and to generate a letter for my Realtor(s), regarding mortgage pre-qualification. Borrower: _____ Date _____ Co- Borrower: _____ Date _____

By Referral Only
The Chesser Group
 300 Esplanade Drive, Ste 210, Oxnard, CA 93036
 Tel: 805-604-2640
 Complete and Fax To: 805-604-2641
Attn: Michael Chesser