

# 'First Step' Client Profile



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New Address:	Sales Price:
Community:	Est. Down Payment:

**BORROWER NAME:**

Social Security #	Date of Birth
Home Phone	Yrs. School
Cell Phone	Email

<input type="checkbox"/> Married <input type="checkbox"/> Unmarried	Children's Ages
Ethnicity:	Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
Are you a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a Permanent Resident? <input type="checkbox"/> Yes <input type="checkbox"/> No
Present Address	
City State Zip	
<input type="checkbox"/> Rent <input type="checkbox"/> Own How Long?	Monthly Payment \$
Previous Address (if less than 2 years)	
City State Zip	
<input type="checkbox"/> Rent <input type="checkbox"/> Own	How Long

**CO-BORROWER NAME:**

Social Security #	Date of Birth
Phone	Yrs. School
Cell Phone	Email
Are you a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a Permanent Resident? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Married <input type="checkbox"/> Unmarried	Children's Ages
Ethnicity:	Sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
Present Address	
<input type="checkbox"/> Rent <input type="checkbox"/> Own	How Long?

**Current Employment and Income**  Check here if Self-Employed

Employer Name	
Address	
City State Zip	
How Long? Or Start Date	# yrs in this line of work
Position	Work #
Base Monthly Salary	Bonus/commission if any, Do you receive regular overtime?
\$ _____/month	\$ _____/month <input type="checkbox"/> Yes OR <input type="checkbox"/> No \$ _____
Hourly Wage and # hours per week _____ @ \$ _____/hour	
Previous Years Total Income (from actual W-2 forms)	
Other Income: Child Support/Alimony/Social Security/Pension: \$ Do you Pay Child Support?: If Yes, Amount Per Month \$	

**Current Employment and Income**  Check here if Self-Employed

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Address	
City State Zip	
How Long? Or Start Date	# yrs in this line of work
Position	Work #
Base Monthly Salary	Bonus/commission if any, Do you receive regular overtime?
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Hourly Wage and # hours per week _____ @ \$ _____/hour	
Previous Years Total Income (from actual W-2 forms)	
Other Income: Child Support/Alimony/Social Security/Pension: \$ Do you Pay Child Support?: If Yes, Amount Per Month \$	

**Previous Employer (if less than 2 years)**

Name
Address
From to Position

**Previous Employer (if less than 2 years)**

Name
Address
From to Position

**Banks/ Investments/Retirement Accounts**

Name	Type of Account	Last Statement ending balance
	Checking	
	Savings	
	401(k) / IRA	

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	Savings	
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Where will your down payment and closing costs Come from: bank accounts, 401(k), gift, stocks, etc.

Have either of you been in CCCS, filed for bankruptcy, or had a home foreclosure?  Yes  No Other

Do you own any real estate?  Yes OR  No Will you be selling home?  Yes  No Any Proceeds from Sale?  Yes OR  No

I/We authorize MTH Lending Group to obtain a credit report. I/We realize loan approval will not result from the submission of this information.

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\_\_\_\_\_ Borrower Signature \_\_\_\_\_ Co-Borrower Signature