



Pre-Qualification Worksheet

FAX 770-279-9141

Realtor® Name: _____
Phone Number: _____

Estimated Purchase Price: _____ Estimated Down Payment Amount: _____
Estimated Refinance Amount: _____ Estimated Appraised Value: _____
Property Address (if known or TBD) _____

Client #1 Name
Name: _____ SSN#: _____ DOB: _____ Home Phone: _____
Years School: _____ Married Single Divorced No. of Dependents: _____ US Citizen Perm. Resident Alien

Client #2 Name (If financing in two names)
Name: _____ SSN#: _____ DOB: _____ Home Phone: _____
Years School: _____ Married Single Divorced No. of Dependents: _____ US Citizen Perm. Resident Alien

Current Residence
Address: _____ City: _____ State: _____ Zip: _____
Rent Own No. Years: _____ (if less than 2 years, list previous address covering a 2 yr period)
Previous Address: _____ City: _____ State: _____ Zip: _____

Client #1 Employment
Employer: _____ Phone: _____
Address: _____ City: _____ State: _____ Zip: _____
No. Years ___ Position/Type of Business: _____ Monthly Base Income (Gross): \$ _____
Salary Hourly Self Employed Yes No Add'l Income: Commission Bonus Overtime Amount: \$ _____

Client #2 Employment
Employer: _____ Phone: _____
Address: _____ City: _____ State: _____ Zip: _____
No. Years ___ Position/Type of Business: _____ Monthly Base Income (Gross): \$ _____
Salary Hourly Self Employed Yes No Add'l Income: Commission Bonus Overtime Amount: \$ _____

Assets (Client #1 and #2 Combined)
Account #1: Type of Account: Checking Savings Money Market Average 2 month balance: \$ _____
Account #2: Type of Account: Checking Savings Money Market Average 2 month balance: \$ _____
Account #3: Type of Account: Checking Savings Money Market Average 2 month balance: \$ _____
Retirement Account/s Total Vested Amount: \$ _____ CD/Other Total Amount: \$ _____

Client Signature _____ Date _____ Client Signature _____ Date _____
Mortgage Loan Originator _____ Date Received _____ Client's Fax Number: _____
(770) 279-0222 Client's Email Address: _____

This is not a loan application as defined by 24 CFR & 3500.2 (b) of The Real Estate Settlement and Procedures Act or by ECOA.
Completion of this worksheet will not result in any type of formal loan evaluation or underwriting. The pre-qualification worksheet is
designed to aid the Mortgage Loan Originator in initial consultation with consumers who are seeking guidance and information in
preparation for applying for a mortgage loan in the future.

Georgia Residential Mortgage Licensee #6578 (NMLS #103956)





Privacy Policy Notice & Credit Card Authorization

Southeast Mortgage does not disclose any nonpublic personal information about the clients for any purpose that is not specifically permitted by law.

We restrict access to non-public personal information about you to those employees who need to know in order to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your non-public personal information.

By signing below, I authorize Southeast Mortgage of Georgia, Inc. to order a copy of my credit report to use in conjunction with this pre-qualification worksheet. The fee for the credit report is non-refundable and can be credited to fees paid should client make application for a mortgage loan with Southeast Mortgage of Georgia, Inc. within 90 days.

VISA, MC, AMEX, Discover, Check or Money Order accepted for your convenience.

Credit Card Authorization: (If paying by credit card, please complete and sign below.)

Visa / MC /AMEX/ Discover (please circle) Card # _____

Credit Card Billing Address: _____

Expiration date _____

Please indicate the amount that you are authorizing with a (•):

_____ \$10.83 (For individual tri-merge credit report – Client #1)

_____ \$10.83 (For individual tri-merge credit report – Client #2)

_____ \$18.66 (For joint tri-merge credit report – Client #1 & Client #2 Applicable to a married couple)

_____ **Date** _____

_____ **Date** _____

Client Signature

Client Signature

