

# Aliant Mortgage Worksheet

Refinance Purchase → Realtor: \_\_\_\_\_ Phone no: \_\_\_\_\_ Company: \_\_\_\_\_  
Subject Property Address: \_\_\_\_\_ City: \_\_\_\_\_ ST: \_\_\_\_\_ Zip: \_\_\_\_\_  
Term of Financing: 15 Year 30 Year Undecided Sales Price: \_\_\_\_\_ Down payment: \_\_\_\_\_

## BORROWER

Full Legal Name: \_\_\_\_\_ SS#: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Home Ph: \_\_\_\_\_  
Cell Ph: \_\_\_\_\_ Marital Status: \_\_\_\_\_ No. of Dependents: \_\_\_\_\_ Ages: \_\_\_\_\_  
Email Address: \_\_\_\_\_

## CO-BORROWER

Full Legal Name: \_\_\_\_\_ SS#: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Home Ph: \_\_\_\_\_  
Cell Ph: \_\_\_\_\_ Marital Status: \_\_\_\_\_ No. of Dependents: \_\_\_\_\_ Ages: \_\_\_\_\_  
Email Address: \_\_\_\_\_

## CURRENT RESIDENCE

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Rent or Own No. of Years \_\_\_\_\_ If owned, current Market Value \$ \_\_\_\_\_ Price Paid \$ \_\_\_\_\_  
Previous Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## BORROWER EMPLOYMENT

Employer: \_\_\_\_\_ Phone no. \_\_\_\_\_  
Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
No. Years: \_\_\_\_\_ Position/Type of Business: \_\_\_\_\_ Monthly Base Income (gross): \$ \_\_\_\_\_  
Salary Hourly Self Employed: Yes No Other Income: Commission Bonus Overtime Amount \$ \_\_\_\_\_  
Previous Employer: (if you have worked at your present job less than 2 years) \_\_\_\_\_

## CO-BORROWER EMPLOYMENT

Employer: \_\_\_\_\_ Phone no. \_\_\_\_\_  
Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
No. Years: \_\_\_\_\_ Position/Type of Business: \_\_\_\_\_ Monthly Base Income (gross): \$ \_\_\_\_\_  
Salary Hourly Self Employed: Yes No Other Income: Commission Bonus Overtime Amount \$ \_\_\_\_\_  
Previous Employer: (if you have worked at your present job less than 2 years) \_\_\_\_\_

## ASSETS (COMBINED)

Bank \_\_\_\_\_ Acct. no. \_\_\_\_\_ Acct. Type \_\_\_\_\_ Current Balance \$ \_\_\_\_\_  
Bank \_\_\_\_\_ Acct. no. \_\_\_\_\_ Acct. Type \_\_\_\_\_ Current Balance \$ \_\_\_\_\_  
Investment Accounts: \_\_\_\_\_ Balance \$ \_\_\_\_\_  
Vested Retirement/401K \_\_\_\_\_ Balance \$ \_\_\_\_\_  
Asset accounts to be used for down payment or closing costs: Sale of Home Gift Other Amt \$ \_\_\_\_\_



**Information for Government Monitoring Purposes:**

The following information is requested by the Federal Government for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal credit opportunity, fair housing and home mortgage disclosure laws. You are not required to furnish this information, but are encouraged to do so. The law provides that a lender may discriminate neither on the basis of this information, nor on whether you choose to furnish it. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note this information on the basis of visual observation or surname. If you do not wish to furnish the information, please check the box below. (Lender must review the above material to assure that the disclosures satisfy all requirements to which the lender is subject under application state law for the particular type of loan applied for.)

**Borrower**

I do not wish to furnish this information

**Ethnicity:**

- Hispanic or Latino
- Not Hispanic or Latino

**Race:**

- American Indian or Alaska Native
- Native Hawaiian or Other Pacific Islander
- Asian
- White
- African American or Black

**Sex:**

- Female
- Male

**Co-Borrower**

I do not wish to furnish this information

**Ethnicity:**

- Hispanic or Latino
- Not Hispanic or Latino

**Race:**

- American Indian or Alaska Native
- Native Hawaiian or Other Pacific Islander
- Asian
- White
- African American or Black

**Sex:**

- Female
- Male

