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# Pre-Application Worksheet

## BORROWER PERSONAL INFORMATION:

**Borrower's Name:** \_\_\_\_\_

**Social Security Number:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_ **Age:** \_\_\_\_\_

**Marital Status:** \_\_\_\_\_

**No. of Children:** \_\_\_\_\_ **Ages:** \_\_\_\_\_

**Present Address:** \_\_\_\_\_ **Own / Rent** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**# Years:** \_\_\_\_\_ **Monthly Payment / Rent \$:** \_\_\_\_\_

**Home Phone Number ( )** \_\_\_\_\_

**Cell:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

## CO-BORROWER PERSONAL INFORMATION:

**Co-Borrower's Name:** \_\_\_\_\_

**Social Security Number:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_ **Age:** \_\_\_\_\_

**Marital Status:** \_\_\_\_\_ **Ages:** \_\_\_\_\_

**No. of Children:** \_\_\_\_\_

**Present Address:** \_\_\_\_\_ **Own / Rent** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**# Years:** \_\_\_\_\_ **Monthly Payment / Rent \$:** \_\_\_\_\_

**Home Phone Number ( )** \_\_\_\_\_

**Cell:** \_\_\_\_\_

**E-mail:** \_\_\_\_\_

## BORROWER INCOME & EMPLOYMENT INFORMATION:

**Gross Monthly Income:** \_\_\_\_\_

**Name of Employer:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Business Phone Number: ( )** \_\_\_\_\_

**Position/Title:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_ **# Years in Line of Work:** \_\_\_\_\_

**ASSETS: Balances [ ] Checking \$ .00 [ ] Savings \$ .00**  
**[ ] 401k/IRA \$ .00 [ ] Stocks \$ .00**

**NOTES:** \_\_\_\_\_

## CO-BORROWER INCOME & EMPLOYMENT INFORMATION:

**Gross Monthly Income:** \_\_\_\_\_

**Name of Employer:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Business Phone Number: ( )** \_\_\_\_\_

**Position/Title:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_ **# Years in Line of Work:** \_\_\_\_\_

**ASSETS: Balances [ ] Checking \$ .00 [ ] Savings \$ .00**  
**[ ] 401k/IRA \$ .00 [ ] Stocks \$ .00**

**NOTES:** \_\_\_\_\_

**PROPERTY ADDRESS:**  
**OCCUPANCY:** [ ] Owner Occ. [ ] 2nd Home [ ] Investor

**TYPE OF PROPERTY:**  
 [ ] Single Family Home [ ] 2 Unit  
 [ ] 3 Unit [ ] 4 Unit

**REFERRAL SOURCE:** \_\_\_\_\_ **TEL:** \_\_\_\_\_ **EMAIL:** \_\_\_\_\_

## CREDIT REPORT CONSENT

I/WE, the undersigned consumer(s), direct lender to obtain copies of my/our credit reports. In the absence of my spouse's signature, I have been authorized to consent on his/her behalf to your obtaining credit reports. This consent shall automatically expire thirty (30) days from the date of my signature(s) below.

\_\_\_\_\_  
 Signed Date | Signed Date

**Borrower Credit Scores:** XPN: \_\_\_\_\_ TU: \_\_\_\_\_ EFX: \_\_\_\_\_ **Co-Borrower Credit Scores:** XPN: \_\_\_\_\_ TU: \_\_\_\_\_ EFX: \_\_\_\_\_

**Preferred Method of Communication:** [ ] Phone [ ] Email [ ] Text [ ] Other \_\_\_\_\_

**Frequency of communication:** [ ] Daily [ ] Weekly [ ] Only when needed [ ] Other \_\_\_\_\_



By completing this Pre-Application Worksheet we can speed up your home mortgage loan process. Your signature is required to begin.

**Tax Disclosure Notice:** Due to the rapid increase in property values in the state of Florida over the past few years, the legislature realized that it was not reasonable to advise the buyer of a residential property to review the previous owner's tax bill to estimate future property taxes, especially for properties which have been homesteaded for a long period of time. The legislature subsequently had tax rates kept artificially low. When a new deed is recorded, the Office of the County Appraiser will reconsider the assessed value under the new market conditions. Law mandates the property tax disclosure.

**PROPERTY TAX DISCLOSURE SUMMARY:** BUYER SHOULD NOT RELY ON THE SELLER'S CURRENT PROPERTY TAXES AS THE AMOUNT OF PROPERTY TAXES THAT THE BUYER MAY BE OBLIGATED TO PAY IN THE YEAR SUBSEQUENT TO PURCHASE. A CHANGE OF OWNERSHIP OR PROPERTY IMPROVEMENTS TRIGGERS REASSESSMENTS OF THE PROPERTY THAT COULD RESULT IN HIGHER PROPERTY TAXES. IF YOU HAVE ANY QUESTIONS CONCERNING VALUATION, CONTACT THE COUNTY PROPERTY APPRAISER'S OFFICE FOR INFORMATION.

Some contracts already incorporate the property tax disclosure wording, while for standard real estate contracts this wording must be included in some type of addendum.