

**PERSONAL INFORMATION**

Applicant Name: \_\_\_\_\_  
 Applicant Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 St: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone #: \_\_\_\_\_  
 Fax #: \_\_\_\_\_  
 Work/Cell: \_\_\_\_\_  
 Marital Status:  Married  Unmarried

Applicant Name: \_\_\_\_\_  
 Applicant Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 St: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone #: \_\_\_\_\_  
 Fax #: \_\_\_\_\_  
 Work/Cell: \_\_\_\_\_  
 Marital Status:  Married  Unmarried

**REQUESTED FINANCING**

Loan Amount: \_\_\_\_\_ Purpose: \_\_\_\_\_ Purchase:  Refinance:   
 Construction:  Rehab:   
 Term: 15 yr  20 yr  25 yr  Rate Program: Adjustable:  Fixed:   
 Type: (Circle One) 2 yr, 5 yr, 10 yr  
 Title will be held in what name(s)  
 1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_

**FOR REFINANCES**

Date of Purchase \$ \_\_\_\_\_  
 Purchase Price \$ \_\_\_\_\_  
 Cost of Improvements \$ \_\_\_\_\_  
 Pay-Off Mortgage 1 \$ \_\_\_\_\_  
 Pay-Off Mortgage 2 \$ \_\_\_\_\_  
 Pay-Off Other \$ \_\_\_\_\_  
 Maturity Date \_\_\_\_\_  
 Next Due Date \_\_\_\_\_  
 Current Monthly Payment: \$ \_\_\_\_\_

**FOR PURCHASES**

Purchase Contract Expires \_\_\_\_\_  
 Purchase Price \$ \_\_\_\_\_  
 Other Financing \$ \_\_\_\_\_  
 Down Payment \$ \_\_\_\_\_ %  
 Seller Finance \$ \_\_\_\_\_ %

**COLLATERAL INFORMATION**

Subject Address: \_\_\_\_\_  
 City: \_\_\_\_\_  
 St: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Estimated Value of Real Estate \$ \_\_\_\_\_  
 Owner Occupied Yes  No   
 Number of Units: \_\_\_\_\_ Sq. Feet: \_\_\_\_\_  
 If Mixed Use: Number of Res. Units \_\_\_\_\_  
 Number of Comm. Units \_\_\_\_\_  
 How will the property be managed? Self Managed   
 If self-managed, do you currently manage other properties? Y N  
 If rental property, please complete. Otherwise leave A-D blank:  
 A.) Gross Annual Income from subject property: \$ \_\_\_\_\_  
 B.) Gross Annual Expenses from subject property: \$ \_\_\_\_\_  
 (DO NOT include mortgage payment in expense number)  
 C.) Net Operating Income \$ \_\_\_\_\_  
 D.) Gross rent of largest tenant \$ \_\_\_\_\_

Property Type:  
 Multi-Family  Mixed Use   
 Self Storage  Retail   
 Office  Warehouse   
 Mobile Home Park  Light Industrial   
 Bed & Breakfast   
 Total Rent \$ \_\_\_\_\_  
 Total Rent \$ \_\_\_\_\_  
 Management Company   
 How many? \_\_\_\_\_ Properties  
 \_\_\_\_\_ Units  
 How long? \_\_\_\_\_ Years \_\_\_\_\_ Months

**EMPLOYMENT INFORMATION**

Applicant: \_\_\_\_\_  
 Employer Address: \_\_\_\_\_  
 City: ST Zip \_\_\_\_\_  
 Self Employed? Y N  
 Position/Title: \_\_\_\_\_  
 Type of Business: \_\_\_\_\_  
 Years on the job: \_\_\_\_\_  
 Years in this line of work: \_\_\_\_\_

Applicant: \_\_\_\_\_  
 Employer Address: \_\_\_\_\_  
 City: ST Zip \_\_\_\_\_  
 Self Employed? Y N  
 Position/Title: \_\_\_\_\_  
 Type of Business: \_\_\_\_\_  
 Years on the job: \_\_\_\_\_  
 Years in this line of work: \_\_\_\_\_

**MONTHLY INCOME AND COMBINED HOUSING EXPENSE INFORMATION**

Gross Monthly Income	Applicant	Spouse/Co-Applicant	Primary Residence	Own	<input type="checkbox"/> Rent	<input type="checkbox"/> # Yrs _____
A. Base Employment	\$ _____	\$ _____	A. Rent			\$ _____
B. Overtime	\$ _____	\$ _____	B. First Mortgage (P&I)			\$ _____
C. Bonuses	\$ _____	\$ _____	C. Other Financing (P&I)			\$ _____
D. Commission	\$ _____	\$ _____	D. Hazard Insurance			\$ _____
E. Dividends	\$ _____	\$ _____	E. Real Estate Taxes			\$ _____
F. Net Rental	\$ _____	\$ _____	F. Mortgage Insurance			\$ _____
G. Other Income	\$ _____	\$ _____	G. Homeowners Assoc. Dues			\$ _____
<b>Total:</b>	\$ _____	\$ _____	H. Other			\$ _____
			<b>Total:</b>			\$ _____

**PERSONAL ASSETS**

Financial Institution	_____	Joint Account	Y	N	Balance:	\$ _____
Financial Institution	_____	Joint Account	Y	N	Balance:	\$ _____
Financial Institution	_____	Joint Account	Y	N	Balance:	\$ _____
Financial Institution	_____	Joint Account	Y	N	Balance:	\$ _____
Stocks and Bonds	_____				Balance:	\$ _____
Other Assets (Itemize)	_____				Balance:	\$ _____

**OTHER REAL ESTATE OWNED**

ADDRESS	PROPERTY TYPE	GROSS MONTHLY RENTAL INCOME	MONTHLY INS. TAXES/EXPENSES	MONTHLY MORTGAGE PMT	MORTGAGE BALANCE
		\$ _____		\$ _____	\$ _____
		\$ _____		\$ _____	\$ _____
		\$ _____		\$ _____	\$ _____
		\$ _____		\$ _____	\$ _____

**BUSINESS INFORMATION**

Business Name	_____	Tax Identification Number	_____
Address	_____	Occupational License Type	_____
City	_____	License Number	_____
St	_____ Zip _____	Date Business Formed	_____
Yrs. Business Owned	_____ % Owned by Guarantor _____ %	Borrower Type	LLC <input type="checkbox"/> LP/LLP <input type="checkbox"/> S CORP <input type="checkbox"/> CORP <input type="checkbox"/> INDIVIDUAL(S) <input type="checkbox"/>

Any individual who owns 10% or more of the business is required to be a guarantor of the loan. Please list ALL additional owner: below. Each individual must complete a Quik App Co-Applicant Form.

Name	Ownership	Married	On Title
_____	_____ %	Y N	Y N
_____	_____ %	Y N	Y N
_____	_____ %	Y N	Y N
_____	_____ %	Y N	Y N

Tax year 1	<u>200</u>	Business Income	Tax year 2	<u>200</u>	Business Income
a. Annual Revenues		\$ _____	a. Annual Revenues		\$ _____
b. Annual Expenses		\$ _____	b. Annual Expenses		\$ _____
<i>(include COG sold and admin expenses)</i>			<i>(include COG sold and admin expenses)</i>		
c. Depreciation Expense		\$ _____	c. Depreciation Expense		\$ _____
d. Interest & Taxes		\$ _____	d. Interest & Taxes		\$ _____
Net Income (a-b+c-d)		\$ _____	Net Income (a-b+c-d)		\$ _____

*If earnings declines by more than 10% since the prior year, a written explanation and year to date information will be required*

Financial Institution	_____	Balance	\$ _____
Financial Institution	_____	Balance	\$ _____
Financial Institution	_____	Balance	\$ _____
Financial Institution	_____	Balance	\$ _____
Stocks and Bonds	_____	Balance	\$ _____
Other Assets (itemize)	_____	Balance	\$ _____
		<b>Total:</b>	\$ _____

	Balance	Monthly Payment
Creditor Name _____	\$ _____	\$ _____
Creditor Name _____	\$ _____	\$ _____
Creditor Name _____	\$ _____	\$ _____
Creditor Name _____	\$ _____	\$ _____
Creditor Name _____	\$ _____	\$ _____
Creditor Name _____	\$ _____	\$ _____
Total:	\$ _____	\$ _____

**PERSONAL DECLARATIONS**

	Guarantor		Spouse	
	Y	N	Y	N
Are there any outstanding judgments against you?	Y	N	Y	N
Have you declared bankruptcy in the past 7 years?	Y	N	Y	N
Have you had property foreclosed upon or given the title or deed in lieu thereof in the last 7 years?	Y	N	Y	N
Are you party to a lawsuit?	Y	N	Y	N
Have you directly or indirectly been obligated on any loan which resulted in foreclosure or judgment?	Y	N	Y	N
Are you presently delinquent on or in default on any federal debt or any other loan, mortgage, financial obligation, bond or loan?	Y	N	Y	N
Are you obligated to pay alimony, child support or separate maintenance?	Y	N	Y	N
Is any part of the down payment borrowed?	Y	N	Y	N
If applicable, do you intend to occupy the property as your primary residence?	Y	N	Y	N
Are you a US Citizen?	Y	N	Y	N
Are you a permanent resident alien?	Y	N	Y	N
Please provide Visa Status if applicable:				

**BUSINESS DECLARATIONS**

Has your business or any principal of your business declared bankruptcy in the past 7 years?	Y	N	Y	N
Is your business or any principal of your business party to a lawsuit?	Y	N	Y	N
Has your business ever defaulted on a federal loan?	Y	N	Y	N
Has any principal of your business had property foreclosed upon within the past 7 years?	Y	N	Y	N
Have you had a business or occupational license revoked within the past 7 years?	Y	N	Y	N

If you answered yes to any of the above statements, please explain:

<b>Applicant Signature</b>	<b>Date</b>	<b>Social Security Number</b>	<b>Date of Birth</b>

<b>Co-Applicant Signature</b>	<b>Date</b>	<b>Social Security Number</b>	<b>Date of Birth</b>

**GENERAL AUTHORIZATION**

I hereby authorize Conner Affiliates, Inc. and Conner Affiliates, LTD to verify my past and present employment, earning records, bank accounts, stock holdings, credit reports and any other third party verifications needed to process my loan application. I further authorize Conner Affiliates Inc., and Conner Affiliates, LTD to order a credit report and verify all other credit information, including past and present mortgage and landlord references. It is understood that a photocopy of this document shall also serve as an authorization to provide the information requested.

<b>Applicant Signature</b>	<b>Date</b>	<b>Social Security Number</b>	<b>Date of Birth</b>

<b>Co-Applicant Signature</b>	<b>Date</b>	<b>Social Security Number</b>	<b>Date of Birth</b>