

# Mortgage Application Checklist

Making the loan process  
simple and convenient

## Thank You!

Thank you for choosing Heartland Mortgage! We want to make the loan process as simple and convenient for you as possible. This checklist is part of those efforts.

Please complete the following information and bring it and your sales contract when you meet with your Heartland Mortgage representative.

Completing this checklist in advance will help make the loan application process go more quickly.

Your interview is scheduled for:

Date \_\_\_\_\_

Time \_\_\_\_\_

Place \_\_\_\_\_

Loan Originator \_\_\_\_\_

Referred by \_\_\_\_\_

If you have any questions about this form call your loan originator at Heartland Mortgage. This form is provided for information purposes and does not constitute an application for a mortgage loan.

## Personal Data

### Applicant

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Work Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

DOB \_\_\_/\_\_\_/\_\_\_ Ages of Dependent Children \_\_\_\_\_

Home Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Own  Rent Since month/year \_\_\_\_\_

Previous Address\* \_\_\_\_\_

City/State/Zip \_\_\_\_\_

\*If less than 2 years at present address.

Mother's maiden name \_\_\_\_\_

### Employment

Present Employer \_\_\_\_\_

Work Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Position \_\_\_\_\_ Since mo/yr \_\_\_\_\_

Gross Monthly Income \_\_\_\_\_

Previous Employer\* \_\_\_\_\_

Work Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Position \_\_\_\_\_ Since mo/yr \_\_\_\_\_

Gross Monthly Income \_\_\_\_\_

\*If less than 2 years at present employer.

## Co-Applicant

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Work Phone \_\_\_\_\_ Home Phone \_\_\_\_\_

DOB \_\_\_/\_\_\_/\_\_\_ Ages of Dependent Children \_\_\_\_\_

Home Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Own  Rent Since month/year \_\_\_\_\_

Previous Address\* \_\_\_\_\_

City/State/Zip \_\_\_\_\_

\*If less than 2 years at present address.

Mother's maiden name \_\_\_\_\_

## Employment

Present Employer \_\_\_\_\_

Work Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Position \_\_\_\_\_ Since mo/yr \_\_\_\_\_

Gross Monthly Income \_\_\_\_\_

Previous Employer\* \_\_\_\_\_

Work Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Position \_\_\_\_\_ Since mo/yr \_\_\_\_\_

Gross Monthly Income \_\_\_\_\_

\*If less than 2 years at present employer.

## Assets

### Capital\*

Institution \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Checking Account# \_\_\_\_\_ Balance \_\_\_\_\_

Savings Account# \_\_\_\_\_ Balance \_\_\_\_\_

Institution \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Checking Account# \_\_\_\_\_ Balance \_\_\_\_\_

Savings Account# \_\_\_\_\_ Balance \_\_\_\_\_

Institution \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Checking Account# \_\_\_\_\_ Balance \_\_\_\_\_

Savings Account# \_\_\_\_\_ Balance \_\_\_\_\_

\*Include banks, credit unions, S&Ls, etc. Attach additional sheets if necessary.

Heartland Mortgage 

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