



## Buyer Intake Form

### Personal Information:

Date: \_\_\_\_\_

Buyer Name

Co-Buyer Name

Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Social Sec. #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
MM DD YYYY

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
MM DD YYYY

Marital Status: \_\_\_\_ Single \_\_\_\_ Married \_\_\_\_ Separated

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# of dependents with ages: \_\_\_\_\_  
(example: 4 kids – 5, 10,12 and 15)

# of dependents with ages: \_\_\_\_\_  
(example: 4 kids – 5, 10,12 and 15)

Furthest Education Completed: \_\_\_\_\_  
(example: High School, Bachelors, Masters, GED, PHD)

Furthest Education Completed: \_\_\_\_\_  
(example: High School, Bachelors, Masters, GED, PHD)

Cell#: \_\_\_\_\_ Home #: \_\_\_\_\_

Cell#: \_\_\_\_\_ Home#: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

### Residence Information:

Present Home Address

Present Home Address

City, State & Zip \_\_\_\_\_ How Long? \_\_\_\_\_

City, State & Zip \_\_\_\_\_ How Long? \_\_\_\_\_

Monthly Housing Payment: \_\_\_\_\_

Monthly Housing Payment: \_\_\_\_\_

Property Status: \_\_\_\_ Owner \_\_\_\_ Renter

Property Status: \_\_\_\_ Owner \_\_\_\_ Renter

If Renter:

If Renter:

\_\_\_\_\_  
Present Landlord Name & Phone #

\_\_\_\_\_  
Present Landlord Name & Phone #

Reason for moving: \_\_\_\_\_

**\*\* If you have lived at your present address for less than 2 years please fill in the "PREVIOUS RESIDENCE INFORMATION" section on page 5 until at least the past 2 years of residence information has been furnished.**

**Employment Information:**

\_\_\_\_\_  
Employer Name

\_\_\_\_\_  
Employer Name

\_\_\_\_\_  
Employer Address (physical address you work at)

\_\_\_\_\_  
Employer Address (physical address you work at)

\_\_\_\_\_  
City, State & Zip Code

\_\_\_\_\_  
City, State & Zip Code

\_\_\_\_\_  
Position/Occupation

\_\_\_\_\_  
Position/Occupation

\_\_\_\_\_  
HR Dept. Employer Phone #

\_\_\_\_\_  
HR Dept. Employer Phone #

Yrs. on Job: \_\_\_\_\_ Monthly Income: \$ \_\_\_\_\_

Yrs. on Job: \_\_\_\_\_ Monthly Income: \$ \_\_\_\_\_

Yrs. in profession: \_\_\_\_\_

Yrs. in profession: \_\_\_\_\_

Self-Employed? \_\_\_\_\_ Yes \_\_\_\_\_ No

Self-Employed? \_\_\_\_\_ Yes \_\_\_\_\_ No

**\*\* If you have been working at your present job for less than 2 years please fill in the "PREVIOUS EMPLOYMENT INFORMATION" section of page 5 until at least the most recent 2 years of employment info. has been furnished.**

**Additional Monthly Income:**

Income Source	Amount	Income Source	Amount
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

**Total Combined Monthly Income: \$ \_\_\_\_\_**

**Assets:**

Account Name/Type	Amount	Account Name/Type	Amount
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

**Total Combined Assets: \$ \_\_\_\_\_**

**Real Estate Owned:**

<b>Address</b>	<b>Mnthly Payment</b>	<b>Mortgage Owed</b>
_____	\$ _____	\$ _____
____ Primary Residence ____ 2 <sup>nd</sup> Home ____ Investment Prop.	<b>Property Type:</b> _____	<b>Yrs. Owned:</b> _____

<b>Address</b>	<b>Mnthly Payment</b>	<b>Mortgage Owed</b>
_____	\$ _____	\$ _____
____ Primary Residence ____ 2 <sup>nd</sup> Home ____ Investment Prop.	<b>Property Type:</b> _____	<b>Yrs. Owned:</b> _____

**New Property Needs Analysis:**

**Property Type: What kind(s) of property are you interested in buying? Choose as many as apply.**

\_\_\_\_ Single Family                      \_\_\_\_ Condominium                      \_\_\_\_ Co-op

\_\_\_\_ Multi- Family      If Multi- Family:      # of units: \_\_\_\_\_

\_\_\_\_ Mixed Use      If Mixed Use:      # of commercial units: \_\_\_\_\_      # of Residential units: \_\_\_\_\_

\_\_\_\_ Commercial Property:      Description: \_\_\_\_\_  
\_\_\_\_\_

**What is your ideal net monthly mortgage payment: \$** \_\_\_\_\_

**Note:** If buying a multi family home, Net Monthly Mortgage is defined as monthly mortgage left to pay after all rents have been received. (Ex: Mortgage \$5,000.00 - \$2,000.00 from rental unit = \$3,000.00 Net Monthly Mortgage)

**Property Features:**

# of Bedrooms: _____	Sq. Ft.: _____	Garage: _____ # of Car(s) _____
# of Bathrooms: _____	Finished Basement: _____	Driveway: ___ Private ___ Shared
# of Kitchens: _____	Heat: ___ Oil ___ Gas	Back Yard: _____ Deck: _____
# of Frml. Dining Rooms: _____	# of Fireplaces: _____	Pool: _____
# of Frml. Living Rooms: _____	# of Dens: _____	If yes: ___ In-ground ___ Above Ground

**Condo/Co-op Specific Amenities:**

Doorman: _____	Gym: _____	Pets Allowed: _____	Laundry In Building: _____
Elevator: _____	Swimming Pool: _____	Parking Available: _____	Smoke Free: _____
Storage: _____	Dishwasher: _____	Public Outdoor Space: _____	Private Outdoor Space: _____

**Additional Desired Property Features:**

\_\_\_\_\_

\_\_\_\_\_

Have you been pre-approved by a mortgage company?:      \_\_\_ Yes      \_\_\_ No

If Yes:

Loan Officer Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## Additional Information Sheet

### Previous Employer Information:

This section is only to be filled out if you have been at your present job for less than 2 years.

\_\_\_\_\_  
Buyer Previous Employer

\_\_\_\_\_  
Co-Buyer Previous Employer

\_\_\_\_\_  
Previous Employer Address

\_\_\_\_\_  
Previous Employer Address

\_\_\_\_\_  
City, State & Zip

\_\_\_\_\_  
City, State & Zip

\_\_\_\_\_  
Job Title/Occupation:

\_\_\_\_\_  
Job Title/Occupation:

\_\_\_\_\_  
HR Dept. Phone #:

\_\_\_\_\_  
HR Dept. Phone #:

\_\_\_\_\_  
Annual Salary: \$

\_\_\_\_\_  
Annual Salary: \$

\_\_\_\_\_  
Dates of Employment:

\_\_\_\_\_  
Dates of Employment:

\_\_\_\_\_  
Self Employed?:      Yes      No

\_\_\_\_\_  
Self Employed?:      Yes      No

### Previous Residence Information:

This section is only to be filled out if you have been living at your present address for less than 2 (two) years.

\_\_\_\_\_  
Buyer Former Address

\_\_\_\_\_  
Co-Buyer Former Address

\_\_\_\_\_  
City, State & Zip

\_\_\_\_\_  
City, State & Zip

\_\_\_\_\_  
Dates Lived      Mnthly. Pymnt

\_\_\_\_\_  
Dates Lived      Mnthly. Pymnt.

\_\_\_\_\_  
Landlord/Property Manager Name & Phone #  
\* Unnecessary if property was owned by buyer

\_\_\_\_\_  
Landlord/Property Manager Name & Phone #  
\* Unnecessary if property was owned by buyer

\_\_\_\_\_  
Reason For Moving:



## Pre-Approval Document Checklist

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### Income Documents:

1. **2021 W2 and/or 1099 form(s).**  
**\*If you are self-employed include your full tax returns.**
2. **2022 W2 and/or 1099 form(s).**  
**\*If you are self-employed include your full tax returns.**
3. **Most Recent Months' worth of paystubs:** 4 pay stubs if paid weekly, 2 pay stubs if bi-weekly.  
**\*If self-employed and you don't receive pay stubs, please include 3 (three) most recent months of business bank statements for each self-employed borrower.**

### Asset Documents:

4. **2 Most Recent Months' Personal Bank Statements:** Any bank account you plan on getting down payment funds from please provide the 2 most recent monthly statements. **Please note that all numbered pages of the statement must be submitted whether they have financial data on them or not.** For example, your statement may have a page counter on page 1 that reads "Page 1 of 5" but there is only financial data on pages 1 – 3. We still need pages 4 and 5 of the statement even if they don't have financial data on them.
5. **Most recent 401k/Pension/Retirement Statement(s):** your most recent retirement statement. Whether you plan on borrowing from a retirement account or not it's always best to show as much assets as possible. If you have them, retirement funds help show mortgage underwriters that you have another level of stability in your financial make up. They are also used to fulfill the "reserves" requirement.

### Identification Documents:

1. Valid Driver's License or Valid Passport
2. Social Security Card

### Miscellaneous Documents:

3. Most recent mortgage statement for all other owned properties.

Please note that the following documentation is required for preapproval. From this point on continue to put your new pay stubs and bank statements to the side, as they do need to be updated throughout the mortgage process. This will make them easy to find when they are requested of you.

Once you have assembled all of your documentation and filled out the buyer intake form you can submit it to the lender of your choice or if you'd like we can refer you to one of our mortgage specialists.

Thank you in advance for your time and effort and we look forward to working with you!

The Panache Team