



## HOME LOAN REFERRAL FORM

**THIS IS A:**  HOME EQUITY LOAN  MORTGAGE LOAN REFERRAL

Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

**PLEASE COMPLETE ALL CONTACT INFORMATION...ALSO BE SURE TO UPDATE MEMBER PROFILE**

Member Name: \_\_\_\_\_ Member Number: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Best time to call: \_\_\_\_\_

Email address: \_\_\_\_\_ Prefer:  phone call

email

Cell Phone (Optional): \_\_\_\_\_

1. Do you own your own primary residence  Yes  No Is it in your name?  Yes  No  
(If mobile/manufactured home, call Mortgage Department for mobile home financing details)
2. Is your home located in Leon or one of our participating counties?  Yes, it is in Leon  Other county  
Name of other county: \_\_\_\_\_
3. What is the current estimated value of your home? \_\_\_\_\_
4. What is your current first mortgage balance? \_\_\_\_\_
5. What is the current balance of any existing second mortgage, home equity, energy lien or down payment assistance lien? \_\_\_\_\_
6. Is your home in good condition with no repairs/construction currently in progress?  
 Yes it is in good condition  Other, please describe \_\_\_\_\_
7. Will you be paying off any debt with this loan?  Yes  No
8. Do you have any credit issues that you believe may be an issue in obtaining a home loan?  
 No issues  Some issues
9. Can your current income be documented with pay stubs or tax returns?  Pay Stubs  Tax Returns  
Other documents: \_\_\_\_\_
10. How much do you want to borrow? \_\_\_\_\_ Term (how long) \_\_\_\_\_  Months  Years

### FOR PURCHASE LOANS ONLY

11. Have you saved any funds for down payment and closing costs?  Yes  No

If so, how much? \_\_\_\_\_

Employee  
Comments: