UFIRST
UNITED FIRST FINANCIAL

Date _____/_____/_____

# MONEY MERGE ACCOUNT WORKSHEET

Please make sure that the Money Merge Account worksheet is filled out completely and as accurately as possible. The results of the Financial Analysis Report will be based on the accuracy of the information provided and is only an estimation. The results will be contingent on your following the MMA program's recommended action plan.

## APPLICANT'S INFORMATION

| | | | |
|---|---|---|---|
| Applicant's Name | | Co-Applicant's Name | |
| Applicant's Home Phone | Applicant's Cell Phone | Co-Applicant's Home Phone | Co-Applicant's Cell Phone |
| Applicant's Work Phone | Applicant's Fax Number | Co-Applicant's Work Phone | Co-Applicant's Fax Number |
| Applicant's E-Mail Address | | Co-Applicant's E-Mail Address | |

## SUBJECT PROPERTY INFORMATION

| | | | |
|---|---|---|---|
| Street Address | | City | State / Zip Code |
| Date of Purchase | Purchase Price | Current Value | Property Type |

## MORTGAGE INFORMATION

| | | | |
|---|---|---|---|
| Name of Lender (1st Mortgage) | Original Loan Amount | Current Loan Amount | Rate |
| Original Term | Term Remaining | Total Monthly Payments (Including Escrow) | Amount to Escrow (Monthly) |
| ☐ Fixed ☐ Variable | | ☐ Conventional ☐ FHA ☐ VA ☐ Sub-Prime | |

| | | | | | |
|---|---|---|---|---|---|
| Name of Lender (2nd Mortgage) | Fixed / HELOC | Original Balance / Limit | Current Balance | Payment | Rate |

## APPLICANT'S INCOME INFORMATION

| | | | |
|---|---|---|---|
| Applicant's Employer | | Co-Applicant's Employer | |
| Applicant's Gross Income (Per Pay Period) | Applicant's Net Income (Per Pay Period) | Co-Applicant's Gross Income (Per Pay Period) | Co-Applicant's Net Income (Per Pay Period) |
| Applicant's Pay Period: ☐ Weekly ☐ Bi-Weekly (every other week) ☐ Semi-Monthly ☐ Monthly | | Co-Applicant's Pay Period: ☐ Weekly ☐ Bi-Weekly (every other week) ☐ Semi-Monthly ☐ Monthly | |
| Applicant's Income Type: ☐ W-2 ☐ Commission ☐ Overtime ☐ Bonus ☐ Other | | Co-Applicant's Income Type: ☐ W-2 ☐ Commission ☐ Overtime ☐ Bonus ☐ Other | |
| Applicant's Job Position | Number of Years at Job | Co-Applicant's Job Position | Number of Years at Job |
| **Discretionary Income:** (Income left over each month after paying all monthly expenses (ie. mortgage, utilities, credit cards, entertainment, etc | $ | **Discretionary Income:** (Income left over each month after paying all monthly expenses (ie. mortgage, utilities, credit cards, entertainment, etc | $ |

| | |
|---|---|
| Applicant's Credit Rating: ☐ A ☐ B ☐ C ☐ D | Co-Applicant's Credit Rating: ☐ A ☐ B ☐ C ☐ D |

## DEBTS / CREDITORS ( OTHER THAN MORTGAGE )

| Creditor | Type | Original Balance | Current Balance | Original Term | Term Remaining | Payment | Rate |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

How did you hear about the MMA program? _____

©2006 UNITED FIRST FINANCIAL

This worksheet is not intended for the purpose of acquiring commercial or residential financing.