

# Mortgage Loan Assessment Form

This **mortgage loan assessment form sample template** is designed to streamline the evaluation process by capturing essential financial and personal information of applicants. It ensures a thorough review of creditworthiness, income, and loan eligibility criteria. Using this template helps lenders make informed decisions efficiently and accurately.

## 1. Personal Information

**Applicant Full Name:**

**Date of Birth:**

**Social Security Number:**  XXX-XX-XXXX

**Residential Address:**

**Phone Number:**

**Email Address:**

**Marital Status:**  Select

**Number of Dependents:**

## 2. Employment & Income Information

**Current Employer:**

**Position/Title:**

**Years with Employer:**

**Gross Annual Income (\$):**

**Other Income (describe & amount):**

## 3. Loan Information

**Requested Loan Amount (\$):**

**Estimated Property Value (\$):**

**Property Address:**

**Property Type:**  Select

**Purpose of Loan:**  Select

## 4. Liabilities & Credit

**Current Mortgage/Rent Payments (\$/month):**

**Other Monthly Debt Payments (total \$):**

**Estimated Credit Score:**

**History of Bankruptcy:**  Select

**Any Delinquent Accounts:**  Select

**Additional Financial Information:**

## 5. Declaration & Signature

I declare that the information provided above is true and complete to the best of my knowledge.

**Applicant Signature:**

**Date:**

**Submit Application**