

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:

Residential Address:

Phone Number:

Email Address:

Marital Status:

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:

Purpose of Loan:

4. Liabilities & Credit

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

Other Monthly Debt Payments (total \$):

Estimated Credit Score:

History of Bankruptcy:

Any Delinquent Accounts:

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