Filling Out Your Client Information Sheet

You fill it out…
No, you fill it out…

Fill out the form completely but **DO NOT** include any social security or account numbers. Since we are not originating a loan for you, we only need the basic information including the current amounts. For credit cards, list only the type, i.e. Visa, Mastercard, etc. For installment loans, just list the type of loan such as an auto loan, student loan, personal loan, etc. For mortgages just list it as a first mortgage, second mortgage, or a Home Equity Line of Credit (HELOC), etc. Once the form is completed, save it and email it to **terrydonovan1@yahoo.com**.

You don't need to worry about filling out the final application from the lender because this form will address that information except for your account numbers. Together, we will scrutinize all the details that will be included on the lender's mortgage application. And, when we have completed our internal client information sheet, you will be ready to create a perfectly prepared mortgage loan application to give to your lender. They will certainly be impressed!

1. Once you open the Client Information Sheet, you must first click the "Enable Editing" button at the top of the form. This will allow you to enter your information right on the form.

2. Also, as soon as you have opened the form, be sure to save it right away. To save it, click "File" then "Save As" then "This PC" (or whatever your version of Word shows), and then under "File Name" type your last name followed by "Application." As you are filling in the form, save it often in order to protect yourself in case of an unseen error that needs to be changed.

3. Even though our form is straight forward, if you have any questions feel free to email me or give me a call at 239-935-7789. If your question is a simple one, email is best because it gives me a record of it in case we need further discussion.

4. When you have completed the form and saved it, email it to me at terrydonovan1@yahoo.com.

5. If for any reason you are unable to utilize the Client Information Sheet directly from my website, just give me a call and I will email it to you.