



**18300 Gridley Road Suites "I", Artesia, CA 90701 /25 + yr experience/  
 Anywhere in CA, we can do the loan-FHA,VA, Conv, Commercial,Jumbo, Luxury home,.....  
 Phone: (562) 809-2643 Fax: (562) 809-0644  
 Email: [Loan@MGBFinancial.com](mailto:Loan@MGBFinancial.com) Web: [www.MGBFinancial.com](http://www.MGBFinancial.com) # 257-608/280-127**

**Thank you for giving us the opportunity to be of service to you. Enclosed herewith information requested by you.  
 Please fill out completely, sign @ bottom & fax back @ 562-809-0644 or mail to us A.S.A.P. We will call you to confirm the information.**

**1. Home Improvement 2. Debt Consolidation 3. Refinance cash out Rate and term Refinance**

**BORROWER INFORMATION - Must be filled out completely – HBS WEB Kal 2022- Refinance**

Borrower: _____ <small>(First name) (M.) (Last name) (Suffix)</small>	Co-Borrower: _____ <small>(First name) (M.) (Last name) (Suffix)</small>
Social Security Number: _____ Date of Birth _____	Social Security Number: _____ Date of Birth _____
Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced	Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced
Number of Dependents: _____	Number of Dependents: _____
Home Phone Number : _____	Home Phone Number: _____
Work Phone Number : _____	Work Phone Number: _____
Cell Phone Number: _____	Cell Phone Number: _____
E-mail Address: _____	E-mail Address: _____
Present Street Address: _____	Present Street Address: _____
City: _____ State: _____ Zip: _____	City: _____ State: _____ Zip: _____
Monthly Rent: _____ Years at present address: _____	Monthly Rent: _____ Years at present address: _____

**EMPLOYMENT INFORMATION**

Employer: _____	Employer: _____
Years with current employer: _____	Years with current employer: _____
Monthly Gross Income: _____ (hourly/weekly/monthly)	Monthly Gross Income: _____ (hourly/weekly/monthly)
2021 W2/tax _____ 2020 W2 /Tax _____ 2019 W2/tax _____	2021 W2/tax _____ 2020 W2 /Tax _____ 2019 W2/tax _____
Type of compensation: <input type="checkbox"/> Salary <input type="checkbox"/> Commission <input type="checkbox"/> Self-employed	Type of compensation: <input type="checkbox"/> Salary <input type="checkbox"/> Commission <input type="checkbox"/> Self-employed
Other Income: _____	Other Income: _____

**PREVIOUS EMPLOYMENT ( if less than two years )**

Employer: _____	Employer: _____
Years with Previous employer: _____	Years with Previous employer: _____
Monthly Income: _____	Monthly Income: _____
Type of compensation: <input type="checkbox"/> Salary <input type="checkbox"/> Commission	Type of compensation: <input type="checkbox"/> Salary <input type="checkbox"/> Commission

**DECLARATIONS**

Any Bankruptcy?  YES  NO If YES, when discharged?( Must be 2 yr s. from the date of discharge ) \_\_\_\_\_

Any foreclosure  YES  NO if YES when ?( Must be 3 yr s. from the date of discharge ) \_\_\_\_\_

Do you have collection accounts? \_\_\_\_\_ If yes, are you willing to pay them? \_\_\_\_\_

Do you  Pay Child Support  Receive Child Support or alimony/amt \_\_\_\_\_ YES NO

**NEW HOME PURCHASE INFORMATION- Only if you are purchasing a home**

Home-Improvement : \_\_\_\_\_ Amount \_\_\_\_\_

Debt Consolidation: \_\_\_\_\_ Give the list of items to pay and balance \_\_\_\_\_

**For Refinance Only: Also To be filled out if you are applying for refinancing**

Reason for refinance \_\_\_\_\_ Year bought \_\_\_\_\_ Sales price \_\_\_\_\_

Present value est \_\_\_\_\_ No Equity in the property \_\_\_\_\_ Present Lender \_\_\_\_\_ Send mortgage coupon with application

Present rate \_\_\_\_\_ Loan amount \_\_\_\_\_ Monthly payment \_\_\_\_\_ Monthly Property tax \_\_\_\_\_ Monthly Property Insurance \_\_\_\_\_

Do you have 2<sup>nd</sup>/ yes \_\_\_ No/ If yes Present rate \_\_\_\_\_ Loan amount \_\_\_\_\_ Monthly payment \_\_\_\_\_ Lender name \_\_\_\_\_

**AUTHORIZATION TO RELEASE INFORMATION**

I / We (undersigned) give MGB Financial services, Inc or its assigns permission/authorization to inquire with standard credit reporting agencies for my/ our credit report. A copy of this authorization may be accepted as an original. This is an inquiry only, not an application.

Borrower \_\_\_\_\_ Date \_\_\_\_\_ Co-Borrower \_\_\_\_\_ Date \_\_\_\_\_





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Thank you so much for your Refinance inquiry.

The MGB Financial Services, Inc is backed by over 25+ years of mortgage experiences. The company emphasizes on personal and professional approach to mortgage lending and provides customers with quick and easy home loans at the best available price.

With each customer's different circumstances, we offer various mortgage products designed to fulfill each customer's needs. To further assist customers, our staff is available on weeknights and weekends.

### **ITEMS NEEDED FOR LOAN APPLICATION- REFINANCE**

1. Color Copy of Social Security Card and Picture I.D.
  2. 1 Month- Current Paycheck stubs
  3. Last two years W-2 forms \_\_\_ 2021 \_\_\_ 2020
  4. Tax Returns \_\_\_ 2021 \_\_\_ 2020
  5. If self-employed - Need Business Tax Returns \_\_\_ 2021 \_\_\_ 2020
  6. If self-employed Profit and loss & Balance Sheet from Jan to applied mos 2022
  7. 3 months bank statements for checking and Savings accounts
  8. Recent statement for \_\_\_ stock, \_\_\_ bond accounts, and \_\_\_ 401k or profit Sharing
- If applicable**
9. Copy of divorce decree (If applicable) and proof of child support
  10. Final bankruptcy papers, including Discharge papers (if Applicable)
  11. DD214 for Veterans only (If applicable)

### **For Refinance or if you own any other property:**

- \_\_\_ Mortgage Coupon
- \_\_\_ Copy of the Note
- \_\_\_ Copy of the property Tax
- \_\_\_ Copy of the Insurance
- \_\_\_ HOA Coupon \_\_\_ Solar Coupon - ( if applicable )
- \_\_\_ Rental agreement ( If applicable )
- \_\_\_ Copy of any utility bill

We are committed to help you as soon as reasonably possible, and thus please feel free to contact Kal or MGB Team at (562) 809-2643 to set up an appointment for pre-qualification, for more information, clarification, guidance, or assistance.