**Fillable Basic Information Questionnaire**

**Please fill out information for each client (all fields are required):**

**To fill out required fields, click where indicated, backspace and enter your information within the text box or make your selection.**

* **Full Legal Name of Client:** Click or tap here to enter text.
* **\*\*Social Security # :** Click or tap here to enter text.**\*\* Please check box below**
* **Home Address:** Click or tap here to enter text.
* **Rent or own:** Choose an item. **Since when:** Click or tap to enter a date.
* **Email:** Click or tap here to enter text.
* **Phone #:** Click or tap here to enter text.
* **Best time to reach you:** Click or tap here to enter text.
* **Date of Birth:** Click or tap here to enter text.
* **Highest Completed Level of Study:** Choose an item.
* **Name of School:** Click or tap here to enter text.
* **Area of Study:** Click or tap here to enter text.
* **Grad year or expected grad year:** Click or tap here to enter text.
* **Primary Source of Income:** Choose an item.
* **Job Title:** Click or tap here to enter text.
* **Company:** Click or tap here to enter text.
* **Company address:** Click or tap here to enter text.
* **Company phone #:** Click or tap here to enter text.
* **Start Month/Start Year:** Click or tap here to enter text.
* **Annual Income (must be verifiable):** Click or tap here to enter text.
* **Additional Compensation and type (verifiable):** Click or tap here to enter text.
* **How much do you have in savings/checking :** Click or tap here to enter text.
* **I get income deposited directly into my bank account:** Choose an item.
* **Investments:** Click or tap here to enter text.
* **Automobile:** Choose an item.
* **Rent or Mortgage monthly payment:** Click or tap here to enter text.
* **Have you applied for a new loan in the past 3 months:** Choose an item.
* **In the past 6 months, how many credit card advances have you taken:** Choose an item.

**Please be advised that additional information will or may be requested (such as, but not limited to, copy of diploma, ID, bank statements, W2’s, paystubs) as well as any other forms needed for completion of the loan process, as well as commission agreements.**

**This form can be filled out on a PC, laptop, or it can be copied and printed out and filled out. You may also text or email the questions back in the exact order given to reduce confusion. Thank you.**

[ ]  **By marking this box, you are indicating that you have read and understand the statement below with regards to our “soft pull” process. This is a required field, and your loan process will not be initiated without it. If you have any further or lingering questions, please contact your loan officer for further clarification of our “soft pull” process prior to checking this box and returning the document to us.**

**\*\* Your social security number is needed for the application process. However, only a “soft pull” will be done and will not affect your credit score to receive quotes. Once you have been offered all your available lines of credit possible to you, you will have an opportunity to review the offers and choose which offers you will decide to either accept or deny. Your social security number will ONLY take a “hard pull” for the offers YOU decide to accept after your review of all offers, and will only be done with your written consent, via another form.**

[ ]  **By marking this box, you are indicating that you have read and understand the statement below. This is a required field.**

**In an effort to expedite the process and better serve you without having to call you for each and every loan we seek for you, we will be opening a gmail account on your behalf with the information you provided with the sole purpose to submit your loan requests. All offers, document requests and communications from the lenders will all be sent to that account, which our loan processors will in turn communicate to you. At the end of the whole application process, all information on this account, including password will be given to you for you to do with the account created whatever you wish, including but not limited to, closing the account down.**