

Lead Category ↓



Sticky Note



Snap Shot



Alerts



Lead Notes



Calendar



See Results



**Borrower 1:** Robert Klein  
**Phone:** 111-111-1111

**Address:** 566 Space Dr., Colton, CA 92265  
**Email:** Robert@msn.com

**Borrower 2:** Mary Klein  
**Phone:** 111-111-1111

**Address:** 566 Space Dr., Colton, CA 92265  
**Email:** Mary@msn.com

**Application:** Joint

**Relationship:** Husband & Wife

**New Title Holders:** Joint

**Add Borrower**

**Lead Stat:** **3** **Demo Stat:** **4**



**Current Loan:** \$335,758

**Current P & I:** \$2,200

**Loan Type:** 30 year fix – 5.5%

**Tax & Insurance:** \$450

**Apprx. Last Refi:** 4 years ago

**Total Payment:** \$2,650

**How many loans:** 2 **Pay off both?** Yes

**Add More Loans**



**New Amount:** \$336,000

**New Loan Purpose:** Rate & Term

**New Loan:** 30 year fix - **“select”**

**Closing Costs:** \$450


**Quoted Rate:** 5%


**Lender Credit:** \$450

**LTV:** 75%

**CLTV:** 70%



**Borrower 1:** Robert Klein  
**DOB:** 02/22/1975  
**Social:** 234-55-6477  
**Estimated Credit:** Excellent  
**Credit Pull Date:** 04/28/14  
**Credit Age:** 2 Days  
**Credit Score:** 700 688 744   
**DTI:** 44% - 32%

**Borrower 2:** Mary Klein  
**DOB:** 01/25/1973  
**Social:** 775-44-2222  
**Estimated Credit:** Excellent  
**Credit Pull Date:** 04/28/14  
**Credit Age:** 2 Days  
**Credit Score:** 712 694 708   
**Qualified Score:** 688



**Properties:** 2  
**Subject Property:** 566 Space Dr., Colton, CA  
**Purpose:** Primary  
**Appraised Value:** \$405,000  
**Year Built:** 1981

**Add Properties**  
**Residence Term:** 5 years  
**Property Type:** SFR  
**Approximate Value:** \$445,000  
**HOA:** No



**Income Source 1:** Employment  
**Employer:** Choice Labs  
**Address:** 123 Avila way  
**Work phone:** 555-555-5555  
**Position:** Admin  
**Length:** 2 years  
**Term:** 3 years  
**Gross Monthly:** \$3,000

**Income Source 1:** Employment  
**Employer:** Choice Labs  
**Address:** 123 Avila way  
**Work phone:** 555-555-5555  
**Position:** Manager  
**Length:** 4 years  
**Term:** 2 years  
**Gross Monthly Income:** \$4,500

**Add Income Source**

**Add Income Source**