



The Florida Keys Home Team
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 www.BuyInTheKeys.com

BORROWER FINANCIAL INFORMATION LOAN #:
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In order to have your Short Sale approved, most lenders will require a review of a financial package that usually includes the following:

- (2) two months bank statements (checking and/or savings)
- (2) two months pay stubs from each borrower,
- (2) two years IRS returns, Financial Statement and other information.

The leading cause of delay and even denial of any offer to the Lender is caused by the Seller failing to deliver these items in a timely manner. To help succeed, complete the following “Financial Worksheet” and collect the information mentioned above to have readily available.

Borrower Name		Co-Borrower Name	
Date of Birth		Date of Birth	
Social Security		Social Security	
Home Phone		Home Phone	
Work Phone		Work Phone	
Mailing Address		Property Address	
Do you occupy the property? <input type="checkbox"/> Yes <input type="checkbox"/> No	Is it a Rental? <input type="checkbox"/> Yes <input type="checkbox"/> No	If So, What is the monthly rental income?	
Is the property listed for sale? <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you contacted your CPA, Tax Consultant, or a Credit Counselor for help? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Agent's Name	Tax Consultant Name		
Agent's Phone	Tax Consultant Phone		
Agent's Email	Tax Consultant Email		
Do you pay Real Estate Taxes? (outside of mortgage payments) <input type="checkbox"/> Yes <input type="checkbox"/> No	Are the taxes current? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Have you filed Bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, <input type="checkbox"/> Chapter 7 <input type="checkbox"/> Chapter 13		
Filing Date:	Are there other liens on the Property? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Attorney's Name	Attorney's Phone		



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Borrower Employer's Name		Co-Borrower Employer's Name	
How Long?		How Long?	

Wages	\$	Wages	\$
Unemployment Income	\$	Unemployment Income	\$
Child Support / Alimony	\$	Child Support / Alimony	\$
Disability Income	\$	Disability Income	\$
Rents Received	\$	Rents Received	\$
Other	\$	Other	\$
Less: Federal and State Tax, FICA	\$	Less: Federal and State Tax, FICA	\$
Less: Other Deductions (401K, etc.)	\$	Less: Other Deductions (401K etc)	\$
Total	\$	Total	\$

Other Mortgages / Liens	\$	Other Mortgages / Liens	\$
Auto Loan(s)	\$	Auto Loan(s)	\$
Auto Expenses / Insurance	\$	Auto Expenses / Insurance	\$
Credit Cards / Installment Loan(s)	\$	Credit Cards / Installment Loan(s)	\$
Health Insurance	\$	Health Insurance	\$
Medical	\$	Medical	\$
Child Care / Support / Alimony	\$	Child Care / Support / Alimony	\$
Food / Spending Money	\$	Food / Spending Money	\$
Water / Sewer / Utilities / Phone	\$	Water / Sewer / Utilities / Phone	\$
Other	\$	Other	\$
Total	\$	Total	\$

Number of People in Household: _____

Voluntary Funds Available: _____