UFIRST
UNITED FIRST FINANCIAL

Date _____/_____/_____

MONEY MERGE ACCOUNT WORKSHEET

Please make sure that the Money Merge Account worksheet is filled out completely and as accurately as possible. The results of the Financial Analysis Report will be based on the accuracy of the information provided and is only an estimation. The results will be contingent on your following the MMA program's recommended action plan.

APPLICANT'S INFORMATION

Applicant's Name		Co-Applicant's Name	
Applicant's Home Phone	Applicant's Cell Phone	Co-Applicant's Home Phone	Co-Applicant's Cell Phone
Applicant's Work Phone	Applicant's Fax Number	Co-Applicant's Work Phone	Co-Applicant's Fax Number
Applicant's E-Mail Address		Co-Applicant's E-Mail Address	

SUBJECT PROPERTY INFORMATION

Street Address		City	State	Zip Code
Date of Purchase	Purchase Price	Current Value	Property Type	

MORTGAGE INFORMATION

Name of Lender (1st Mortgage)	Original Loan Amount	Current Loan Amount	Rate
Original Term	Term Remaining	Total Monthly Payments (Including Escrow)	Amount to Escrow (Monthly)
☐ Fixed ☐ Variable		☐ Conventional ☐ FHA ☐ VA ☐ Sub-Prime	

Name of Lender (2nd Mortgage)	Original Balance / Limit	Original Term	Current Balance	Term Remaining	Payment	Rate	Fixed / HELOC

APPLICANT'S INCOME INFORMATION

Applicant's Employer		Co-Applicant's Employer	
Applicant's Gross Income (Per Pay Period)	Applicant's Net Income (Per Pay Period)	Co-Applicant's Gross Income (Per Pay Period)	Co-Applicant's Net Income (Per Pay Period)
Applicant's Pay Period: ☐ Weekly ☐ Bi-Weekly (every other week) ☐ Semi-Monthly ☐ Monthly		Co-Applicant's Pay Period: ☐ Weekly ☐ Bi-Weekly (every other week) ☐ Semi-Monthly ☐ Monthly	
Applicant's Income Type: ☐ W-2 ☐ Commission ☐ Overtime ☐ Bonus ☐ Other		Co-Applicant's Income Type: ☐ W-2 ☐ Commission ☐ Overtime ☐ Bonus ☐ Other	
Applicant's Job Position	Number of Years at Job	Co-Applicant's Job Position	Number of Years at Job
Discretionary Income: (Income left over each month after paying all monthly expenses (ie. mortgage, utilities, credit cards, entertainment, etc	$	**Discretionary Income:** (Income left over each month after paying all monthly expenses (ie. mortgage, utilities, credit cards, entertainment, etc	$
Applicant's Credit Rating: ☐ A ☐ B ☐ C ☐ D		Co-Applicant's Credit Rating: ☐ A ☐ B ☐ C ☐ D	

DEBTS / CREDITORS (OTHER THAN MORTGAGE)

Creditor	Type	Original Balance	Current Balance	Original Term	Term Remaining	Payment	Rate

How did you hear about the MMA program? _____

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This worksheet is not intended for the purpose of acquiring commercial or residential financing.