

WESTGATE CAPITAL

PROSPECT INFORMATION

CREDIT REPORT (CLIENT INITIAL)

NAME(S): _____

ADDRESS: _____

CITY: _____ **ZIPCODE:** _____

NUMBER OF YEARS: _____ **MO.** _____ **RENT** ☐ **OWN** ☐ **HOA:** _____

DATE OF BIRTH: _____/_____/_____ **CITIZEN: YES** ☐ **NO** ☐ **STATUS** _____

HOME PHONE: () _____ **CELL PHONE ()** _____

WORK TELEPHONE: () _____ **EMAIL:** _____

MARITAL STATUS: _____ **SOCIAL SECURITY NO(S)** _____ - _____ - _____

CHILDREN NO. _____ **AGES** _____ - _____ - _____

EMPLOYER: _____ **PHONE: ()** _____

ADDRESS: _____

OCCUPATION: _____ **BUS TYPE:** _____

YEARS EMPLOYED: _____ **YRS** _____ **MO** **ANNUAL INCOME: \$** _____

BANK: _____ **CHECKING** ☐ **SAVINGS** ☐ **OTHER** ☐

AUTOS: MAKE: _____ **YR:** _____ **MAKE:** _____ **YR** _____

☐ **REFINANCE: 1ST \$** _____ **2ND \$** _____ **CURRENT RATE:** _____%

☐ **NEW PURCHASE: \$** _____ **SALE PRICE \$** _____ **DEPOSIT**

SOURCE OF DEPOSIT: _____

NOTES: _____