



Mortgage Loan Borrower's Information Form

Step 1: Download and save document to your computer

Step 2: Print document

Step 3: Fill document out thoroughly

Step 4: Save and Email to richard@caliref.com

IMPORTANT INFORMATION!

(Please read the following before completing the form below)

Besides the information you provide below, you will need to scan documents that contain your sensitive data and send them to us. **DO NOT** send your sensitive data via regular email. We have provided an encrypted email host for you to send them safely and securely.

To do so, return to the **Apply Here** page on our website and click the link that says **Secured Data Transfer with SecureDock**.

You will be directed to the **SecureDock** website where you will upload your documents and send them to us.

(The required documents to scan and send are listed below. Only provide the information that applies to you)

- ✓ Two Current paystubs.
- ✓ Current and previous year's W-2
- ✓ Current and previous year's 1099's *(if you receive retirement Income such as Social Security, Pensions etc. and award letter)*
- ✓ Current and previous year's Federal Income Tax Returns *(All pages of return. Business, Partnerships and K-1's if applicable)*
- ✓ Two (2) current months of Bank Statements *(Checking, Savings, 401K, Stocks, IRA etc. Please send entire bank statement.)*
- ✓ Homeowners Insurance *(Just front page that lists agent, phone & premium)*
- ✓ Copy of Driver's License for each borrower.
- ✓ Current mortgage statement and Homeowners Insurance documents for any additional properties you may own. *(if applicable)*

Personal Information

Please provide the following information that is applicable.

Borrower				Co-Borrower			
Last Name		First Name, Middle Initial		Last Name		First Name, Middle Initial	
Street Address		City, State	Zip Code	Street Address		City, State	Zip Code
Home Phone	Mobile Phone	Marital Status	No. of Dependent Children	Home Phone	Mobile Phone	Marital Status	No. of Dependent Children
Employment Information							
Borrower				Co-Borrower			
Employer Name		Years / Months on Job		Employer Name		Years / Months on Job	
Employer Street Address		City, State	Zip Code	Employer Street Address		City, State	Zip Code
Position / Title		Employer Telephone		Position / Title		Employer Telephone	
If employed at current job for less than two years or currently employed at more than one position, complete the following							
Employer Name		Years / Months on Job		Employer Name		Years / Months on Job	
Employer Street Address		City, State	Zip Code	Employer Street Address		City, State	Zip Code
Position / Title		Employer Telephone		Position / Title		Employer Telephone	

Please check for accuracy.

Save and Email completed form to richard@caliref.com

If you should have any questions, please call (510) 325-8800.