UFIRST
UNITED FIRST FINANCIAL

Date_____

MONEY MERGE ACCOUNT™ WORKSHEET

Please make sure that the Money Merge Account™ worksheet is filled out as completely and as accurately as possible. The results of the Money Merge 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 Money Merge Account program's recommended action plan. By filling out this worksheet, you are not obligated to enroll on the Money Merge Account program. This information will be kept confidential and will only be used for inter-office processing.

HOMEOWNER INFORMATION

Name		Name	
Home Phone	Cell Phone	Home Phone	Cell Phone
Work Phone	Fax Number	Work Phone	Fax Number
E-Mail Address		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

INCOME INFORMATION

Employer		Employer	
Gross Income (Per Pay Period)	Net Income (Per Pay Period)	Gross Income (Per Pay Period)	Net Income (Per Pay Period)
Pay Period: ☐ Weekly ☐ Bi-Weekly (every other week) ☐ Semi-Monthly ☐ Monthly		Pay Period: ☐ Weekly ☐ Bi-Weekly (every other week) ☐ Semi-Monthly ☐ Monthly	
Income Type: ☐ W-2 ☐ Commission ☐ Overtime ☐ Bonus ☐ Other		Income Type: ☐ W-2 ☐ Commission ☐ Overtime ☐ Bonus ☐ Other	
Job Position	Number of Years at Job	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	$

Homeowner's Credit Rating: ☐ A ☐ B ☐ C ☐ D	Homeowner'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 Money Merge Account program? _____

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