



# New Client Intake Form

Client(s) \_\_\_\_\_

Referral Date \_\_\_\_\_ App Date \_\_\_\_\_

How were you referred to us? \_\_\_\_\_ Referral gift sent: Y N

How did you come to know the referrer? \_\_\_\_\_

What did the referrer say about us? \_\_\_\_\_

Real Estate Agent \_\_\_\_\_

First Time Buyer	Monthly Rent _____	Mtg Pmnt _____
Move Up	How long have you rented there? _____	_____
Refinance	_____	# Owned Properties _____
Investor	On-time Pmnts? Y N	Est. Value _____

Name(s) of everyone going on loan \_\_\_\_\_

Ph# \_\_\_\_\_ Ph# \_\_\_\_\_

Email \_\_\_\_\_ Email \_\_\_\_\_

Primary point of contact \_\_\_\_\_ Contact method preferred \_\_\_\_\_

How are you related to your co-borrower? \_\_\_\_\_

Mailing Address \_\_\_\_\_

Physical Address \_\_\_\_\_

Have you or your co-borrower served in the US Armed Forces? Y N	What is your purchase timeline? 1-3 Months 3-6 Months 6+ Months
Disabled Veteran? Y N Previous VA loan? Y N	
What is your desired total monthly payment? _____	
What is your budget for a down payment? _____	30yr Fixed 15yr Fixed ARM
Comments _____	
_____	
_____	
_____	

Which account will your down payment come from? \_\_\_\_\_

Have those funds been in the account for the last 60 days? Y N

Checking \_\_\_\_\_ Stocks \_\_\_\_\_ \*Gift \_\_\_\_\_ Loan \_\_\_\_\_ Home Sale \_\_\_\_\_

Checking \_\_\_\_\_ Stocks \_\_\_\_\_ Notes \_\_\_\_\_

Savings \_\_\_\_\_ Bond \_\_\_\_\_

Savings \_\_\_\_\_ Bond \_\_\_\_\_

Misc. Notes \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Low-middle score(s) \_\_\_\_\_  
Auto: \_\_\_\_\_  
CC: \_\_\_\_\_  
\_\_\_\_\_  
Student: \_\_\_\_\_  
\_\_\_\_\_  
Other: \_\_\_\_\_  
\_\_\_\_\_  
Derogatories or Collections? Y N  
Notes \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SSN \_\_\_\_\_ SSN \_\_\_\_\_  
DOB \_\_\_\_\_ DOB \_\_\_\_\_  
Married? Y N  
Notes \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

---

Borrower \_\_\_\_\_ Employer Name \_\_\_\_\_  
Position \_\_\_\_\_ How long? \_\_\_\_\_  
Hourly \_\_\_\_\_ Salary \_\_\_\_\_ How long in profession? \_\_\_\_\_  
Gross Income \$ \_\_\_\_\_ /Mo. Bonus \$ \_\_\_\_\_ /Mo./Yr. Commissions \$ \_\_\_\_\_ /Mo./Yr.  
Other Income Info \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

.....  
Borrower \_\_\_\_\_ Employer Name \_\_\_\_\_  
Position \_\_\_\_\_ How long? \_\_\_\_\_  
Hourly \_\_\_\_\_ Salary \_\_\_\_\_ How long in profession? \_\_\_\_\_  
Gross Income \$ \_\_\_\_\_ /Mo. Bonus \$ \_\_\_\_\_ /Mo./Yr. Commissions \$ \_\_\_\_\_ /Mo./Yr.  
Other Income Info \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

---

Have you ever had a divorce? Y N #Dependents \_\_\_\_\_ Ages \_\_\_\_\_  
Do you receive or pay Child Support or Alimony? Y N \_\_\_\_\_  
Childcare Costs \_\_\_\_\_  
Are you a US Citizen? Y N \_\_\_\_\_  
Any outstanding taxes owed? Y N \$ \_\_\_\_\_  
Have you had a short sale, foreclosure, or bankruptcy in the past 7 years? Y N  
Notes \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you plan to be out of town during the next 2-3 months? Y N \_\_\_\_\_  
What is your main concern when thinking about obtaining a home loan, why? \_\_\_\_\_

---

Added to Total Connect: Y N Appt. Set \_\_\_\_\_ Doc needs list sent \_\_\_\_\_  
Agent Updated \_\_\_\_\_ TY Card Sent: Y N

# Borrower Signature Authorization

**Privacy Act Notice:** This information is to be used by the agency collecting it or its assignees in determining whether you qualify as a prospective mortgagor under its program. It will not be disclosed outside the agency except as required and permitted by law. You do not have to provide this information, but if you do not your application for approval as a prospective mortgagor or borrower may be delayed or rejected. The information requested in this form is authorized by Title 38, USC, Chapter 37 (if VA); by 12 USC, Section 1701 et. seq. (if HUD/FHA); by 42 USC, Section 1452b (if HUD/CPD); and Title 42 USC, 1471 et. seq., or 7 USC, 1921 et. seq. (if USDA/FmHA).

## Part I - General Information

1. Borrower		2. Name and address of Lender/Broker Pineyro Capital Group Inc. 11820 Miramar Parkway Ste 110 Miramar, Florida 33025 NMLS No. 420112	
3. Date	4. Loan Number		

## Part II - Borrower Authorization

I hereby authorize the Lender/Broker to verify my past and present employment earnings records, bank accounts, stock holdings, and any other asset balances that are needed to process my mortgage loan application. I further authorize the Lender/Broker to order a consumer credit report and verify other credit information, including past and present mortgage and landlord references. It is understood that a copy of this form will also serve as authorization.

The information the Lender/Broker obtains is only to be used in the processing of my application for a mortgage loan.

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Date



# CREDIT CARD AUTHORIZATION FORM FOR CREDIT REPORT

I / We have applied for a mortgage loan. As part of the application process, I / We understand that a tri-merge credit report must be pulled and evaluated and is required for loan purposes.

I / We hereby authorize **PINEYRO CAPITAL GROUP INC.** to order a tri-merge credit report and authorize the billing of the credit card information set forth below for the cost of the tri-merge credit report. I / We understand that this fee is non-refundable.

I / We understand that the cost of a single applicant tri-merge report is \$28.00 and for a joint application the tri-merge credit report cost is \$56.00.

I also authorized **PINEYRO CAPITAL GROUP INC.** to pull my (our) credit report(s) for the sole purpose of a mortgage loan approval for a property located in the State of Florida.

All information contained in this disclosure will be kept strictly confidential and will only be used for the purpose set forth in this document.

A copy of this authorization may be accepted as an original.

Name on Credit Card \_\_\_\_\_

Address on Billing Statement \_\_\_\_\_

Email Address \_\_\_\_\_

Type of Credit Card \_\_\_\_\_ MC \_\_\_\_\_ VISA \_\_\_\_\_ AMEX

Credit Card Number \_\_\_\_\_

Credit Card Expiration Date \_\_\_\_/\_\_\_\_

Security Code \_\_\_\_\_ (3 digit # found on back of card; 4 digit for American Express)

Borrower's Signature \_\_\_\_\_ Date \_\_\_\_\_

Co-Borrower's Signature \_\_\_\_\_ Date \_\_\_\_\_