



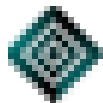
**PLATINUM
SERVICE**



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Pre-Purchase Worksheet

1. Address of home to be purchased (if known): _____
2. Purchase price (Or desired pre-qualification amount): \$ _____
3. This home will be: Primary Residence ___ 2nd Home ___ Investment Property ___
4. Down payment amount: \$ _____ or Percent ___ %
5. Down payment will come from: _____
I.e. Checking, savings, investments, sale of stock, sale of home, 401K loan, gift, bonus, etc.
6. Term of mortgage requested: ___ Yrs Type: ARM ___ Fixed ___ Undecided ___
7. Names to appear on title as: _____
8. Borrower information: Married ___ Unmarried ___
Borrower name _____ Co-Borrower name _____
SSN: _____ DOB: _____ SSN: _____ DOB: _____
9. Current home address: _____
(If less than 2 years at this address please provide previous address below)
Own ___ Rent ___ Time at this address ___ Yrs ___ Mo Monthly Pmt \$ _____
If owned, is home listed for sale? Yes ___ No ___ Under Contract? Yes ___ No ___
If renting, please complete the following: Landlord or property name/phone: _____
Previous address: _____
(Only required if living at current address for less than 2 years)
Own ___ Rent ___ Time at this address ___ Yrs ___ Mo Monthly Pmt \$ _____
If rented, please complete the following:
Landlord or property name: _____ LL phone: _____
10. Borrower home phone: _____ Borrower office phone: _____
11. Borrower fax: _____ Borrower email: _____



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12. **Employer:** _____ **City** _____ **State** _____
 (If less than 2 years with this employer please provide previous employment information below)

How long with this employer ____ Yrs ____ Mo **Start Date** _____ (If new hire)

Job Title _____ **How long in this type of work** ____ Yrs

Phone number for employment verification (HR): _____

Previous employer: _____ **City** _____ **State** _____
 (Only required if less than 2 years with current employer)

How long with previous employer ____ Yrs **Last day** _____

Phone number for previous employment verification (HR): _____

13. **Co-Bor employer:** _____ **City** _____ **State** _____
 (If less than 2 years with this employer please provide previous employment information below)

How long with this employer ____ Yrs ____ Mo **Start Date** _____ (If new hire)

Job Title _____ **How long in this type of work** ____ Yrs

Phone number for employment verification (HR): _____

Co-Bor office phone: _____ **Fax:** _____

Co-Bor email: _____

Previous employer: _____ **City** _____ **State** _____
 (Only required if less than 2 years with current employer)

How long with previous employer ____ Yrs **Last day** _____

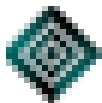
Phone number for previous employment verification (HR): _____

List monthly income including source of income. I.e. Base salary, annual bonus (signing bonus should be listed with assets not income), commission, self-employment, rental, investment, social security, pension, trust, annuity, etc.

Monthly Income:	Source of Income:
\$	
\$	
\$	
\$	

14. List primary asset amounts and type. I.e. checking, savings, money market, investment, signing bonus, stock, stock options, 401k, IRA, annuity, real estate, etc.

Assets Amount:	Type of Asset:
\$	Estimated market value of residence
\$	
\$	
\$	
\$	



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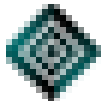
15. List Monthly obligation amounts and type. I.e. Mortgage loans, auto loans, student loans, personal loans, credit Cards, 401k loans, child support, alimony, co-signed loans, etc.

Monthly Obligation:	Type of Liability:
\$	Mortgage payment
\$	
\$	
\$	
\$	
\$	
\$	
\$	
\$	
\$	

16. Any judgments, lawsuits, bankruptcies (last 10yrs), foreclosures (last 7 Yrs)? Yes ___ No ___

17. Are borrowers U.S. Citizens? Yes ___ No ___ **If no, please state Visa Type and length of time in the United States** _____

18. Is either borrower Self employed, own 25% or more of a Corporation or Partnership, or derive 25% or more of income from commissions? ___ Yes ___ No **If yes, please clarify**



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Consent for Credit Verification

I/We authorize the Lender and any potential investor or insurer of this credit transaction to verify; employment and income history, bank, and credit history. The source of the information may come from, but is not limited to: credit bureaus; banks and other depository institutions; current and former employers; federal or state records including State Employment Security Agency records; or other sources as required.

This authorization is for this credit transaction only and continues in effect for one (1) year unless limited by state law, in which case the authorization continues in effect for the maximum period, not to exceed one (1) year, allowed by law.

Applicant's Signature

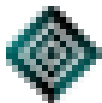
Date

Social Security Number

Co-Applicant's Signature

Date

Social Security Number



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Concierge Service

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In order to personalize our service to our clients, we like to get to know them from the very beginning! Please take a moment and tell us a little about yourself. Our goal is to provide the highest level of service possible to our clients so they will continue to refer us to their friends and family.

Name: _____ Spouse/Significant Other: _____

Address: _____

Home Phone: _____ Fax: _____

Work Phone: _____ Fax: _____

Spouse Work Phone: _____ Fax: _____

Cell Phone: _____ Spouse Cell Phone: _____

E-Mail: _____ Spouse E-Mail: _____

Employer: _____ Spouse Employer: _____

Your Birthday: _____ Spouse's: _____ Wedding Anniv.: _____

Children living with you: _____ Their Birthday: _____ Their Interest: _____

1. _____

2. _____

3. _____

Pet's Name/Type: _____

Where are you from originally? _____ Spouse/SO: _____

College (Borrower): _____ Degrees: _____ Fraternity/Sorority: _____

(Spouse/SO): _____

Professional or Trade Associations, Clubs (Masons, Kiwani's): _____

Religion: _____ Active? _____ Politically Active? _____ Party: _____

Active in Community? _____ How? _____ Charity/Volunteer? _____

Please list your favorite in the following categories:

Restaurant/ Type of food? _____ Spouse/SO _____

Coffee, Tea, Wine? What kind? _____ Spouse/SO _____

Flower or plant? _____ Spouse/SO _____

Sport or Hobbies? _____ Spouse/SO _____

Retail store? _____ Spouse/SO _____

Favorite dessert? _____ Spouse/SO _____

Types of books or music? _____ Spouse/SO _____

Activity for fun? _____ Spouse/SO _____

Our goal is to continue to WOW you with our service. We want you to enjoy the journey as we develop a long and lasting relationship.



Buying or Selling



New Home Profile

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We have created this profile to help you to find just the right home. With this information your Realtor will use their computer data base to narrow your search; provide a list of homes for sale that match your profile; and help you find the perfect home.

PREFERRED LOCATION:

South West North County City St. Charles County
Other _____

PREFERRED SCHOOLS

Elementary _____ Middle _____ High _____

Preferred Parish or Church: _____

IS BEING CLOSE TO WORK IMPORTANT? YES NO

IF SO WHERE DO YOU WORK: _____

MAJOR CROSS STREETS: _____

DO YOU HAVE A PREFERRED SUBDIVISION: _____

PREFERRED HOME SIZE

BEDROOMS 2 3 4 5 more # _____

BATHROOMS 1 2 3 more # _____

EAT IN KITCHEN Yes No

FORMAL DINING ROOM Yes No

LIVING AREA: Living Room & Denor Great Room

GARAGE? 1-CAR 2-CAR 3-CAR more # _____

NEED AN OFFICE IN THE HOME? Yes No

NEED SEPARATE LIVING QUARTERS? Yes No

W/KITCHEN? Yes No

ADDITIONAL OUTSIDE STORAGE? Yes No

RV ACCESS/STORAGE? Yes No

PREFERRED HOME STYLE

- PUEBLO (FLAT ROUNDED ROOF w/ VIGAS)
- TERRITORIAL (FLAT SQUARE ROOF w/ BRICK TRIM)
- S/W CONTEMPORARY (FLAT SQUARE ROOF / HIGH CEILINGS / MODERN)
- TRADITIONAL (PITCHED ROOF / ROCK OR SHINGLE / STUCCO, OR BRICK)
- TAOS (HIGH PITCHED METAL ROOF)
- SPANISH (STUCCO w/ TILE ROOF)

PREFERRED LOT SIZE

- FULL LOT SIZE (1/4 ACRE OR MORE)
- SMALLER LOT (1/5 ACRE OR LESS)
- TOWN HOUSE LOT — COMMON WALL WITH NEIGHBOR
- PATIO HOME LOT — ONE SIDE COMMON WALL w/SIDE YARD
- CONDO — NO LAND
- OTHER _____

PREFERRED LANDSCAPING

- FULL LANDSCAPING FRONT & BACK (FULL PLANTINGS, TREES, GRASS)
- FULL LANDSCAPING BACK (MINIMAL FRONT)
- FULL LANDSCAPING FRONT (MINIMAL BACK)
- XERISCAPE
- RV ACCESS
- DEFINED PLAY AREA FOR CHILDREN
- SWIMMING POOL
- JACUZZI OR SPA

PREFERRED AGE

- NEW
- RESALE
- LESS THAN 5 YEARS OLD
- LESS THAN 10 YEARS OLD
- OTHER _____
- PREFERRED BUILDER FOR NEW OR RESALE _____

WHAT NEXT

Now that you have spent some time describing your perfect home, contact your Realtor and let them copy this profile form. They will search their computer database and find you several homes to view that meet your criteria. We are happy to be of service. If you have any questions, please call me immediately for a quick answer to any of your questions.

Ben Carmona 314-645-6246