Patrick Schwerdtfeger
Mortgage Banker

Windsor Capital Mortgage Corporation
10935 Vista Sorrento Pkwy, Suite 200
San Diego, CA 92130
DRE #01050210

Refinance Application

Phone: 925-465-1223
Fax: 925-476-0799

Property & Refinance Information

Address of Subject Property		**Estimated Market Price**
Year Purchased	**Original Purchase Price**	**Balance of 1st Mortgage**
Primary Residence or Investment Property?	**Cash-Out Desired *(if any)***	**Balance of 2nd Mortgage *(if applicable)***

Personal Information

Applicant's Name ☐ Married ☐ Single ☐ Other		**Social Security Number**
Current Street Address		**Date of Birth**
Current City, ST ZIP ☐ Own ☐ Rent		**How long have you lived there?**
Email Address		**Home Phone**
Co-Applicant's Name ☐ Married ☐ Single ☐ Other		**Social Security Number**
Current Street Address		**Date of Birth**
Current City, ST ZIP ☐ Own ☐ Rent		**How long have you lived there?**

Employment Information

Applicant's Employer			**Base Income**
Street Address			**Overtime**
City, ST ZIP			**Bonuses**
Position			**Commissions**
Work Phone	**Yrs in Job**	**Yrs in Profession**	**Other Income**
Co-Applicant's Employer			**Base Income**
Street Address			**Overtime**
City, ST ZIP			**Bonuses**
Position			**Commissions**
Work Phone	**Yrs in Job**	**Yrs in Profession**	**Other Income**

Declarations, Assets & Expenses

	Yes	No
Have you had any property foreclosed upon or given title or deed in lieu thereof during the past 7 years?	☐	☐
Have you declared bankruptcy during the past 7 years?	☐	☐
Are there any outstanding judgments against you?	☐	☐
Are you presently delinquent or in default on any Federal debt?	☐	☐
Are you currently a party to a lawsuit?	☐	☐
Is any part of the down payment borrowed?	☐	☐
Are you a US Citizen?	☐	☐

Source of closing costs: ☐ Savings / Checking ☐ Wrapped into new loan

Liquid Assets	Expenses / Mnth
Savings / Checking	**Rent or Mortgage**
Stocks / Bonds	**Car Payment or Lease**
Vested Retirement	**Student Loan Payment**
Real Estate Equity	**Credit Cards / Other**

By signing below, I/we hereby authorize Windsor Capital Mortgage Corporation and/or Patrick Schwerdtfeger to obtain information regarding my/our past and present employment, assets, liabilities and/or credit history.

Applicant Signature _____ **Date** _____ **Co-Applicant Signature** _____ **Date** _____