



1101 Fifth Avenue, #150
San Rafael, CA 94901
Office: 415-259-4979
Fax: 650-284-2599

Information needed for Financial Assessment

- Proof of Income as applicable:
 - ✓ Social Security Income as shown on SS Awards Letter
\$_____per month
 - ✓ Pension Income \$_____per month
 - ✓ Employment Income \$_____per month (net)
 - ✓ Other income \$_____per month
- Available Cash: \$_____
- Investment Portfolio Balance: \$_____
- Property Taxes: Annual Dues (for all properties owned, i.e. rental properties, second home, etc.) \$_____ \$_____ \$_____
- Homeowner’s Insurance Declaration Page, must show annual premium (for each properties owned) \$_____ \$_____ \$_____
- Homeowner’s Association (HOA) (if applicable) fee \$_____
- Square Footage of home: _____
- Monthly Revolving Payments
 - ✓ Car payment :\$_____
 - ✓ Credit Cards: \$_____
 - ✓ Other \$_____

Please provide verbal or written authorization for us to pull your credit report.
Please give Mary Jo or Christina your social security number (not by email)

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Christina Rosellini (Assistant): crosellini@rfsLends.com