



BANK STATEMENT INCOME CALCULATION REQUEST

Please complete all applicable fields and email this form and supporting documentation to your Account Executive .
Allow 24 hours for a response once submitted to Underwriting for review.

I. BROKER CONTACT INFORMATION

Broker Company	Requester Name
Requester Email	Requester Phone
Account Executive	

II. APPLICANT INFORMATION

Applicant Full Name	Last 4 Digits of SSN		
Business Name	Minimum 2 Year's Self-employed	Yes	No
Percent Ownership	Business Expense Factor (%)		

III. INCOME ANALYSIS

Submit the following documentation for income analysis (self-employed only).

Bank statement program: Business Bank Statements or Personal bank statements

- Co-Mingled accounts will be treated as business bank statements.
- Personal bank statement program requires 2 months business bank statements.

Statements covering: 12 months bank statements or 24 months bank statements

Business Type: Product-based Business (Sells goods) OR Service-based

Business Number of Employees/ Contractors (if service based):

IV. BUSINESS NARRATIVE

Provide any information regarding the borrower's business (nature of business, how borrower gets paid, are multiple sources of revenue present, etc. Be sure to indicate if the borrower changed bank accounts or business names during the statement period: