

Continuation Sheet/Residential Loan Application

For use to complete the Residential Loan Application to allow full communication and disclosure.	Borrower:	Agency Case Number:
	Co-Borrower:	Lender Case Number:

Throughout the loan process, additional information may be needed from professionals you have retained or worked with. Please provide the following information to assist us in the process and to expedite any needed communication.

Human Resource Manager			
Name	Phone	Fax	E-Mail Address

Do you have a preferred insurance professional or may we recommend one? Yes No Please Refer Me.

Insurance Professional			
Name	Phone	Fax	E-Mail Address

Do you have a will or trust? Yes No Please Refer Me.

Family Planning: Wills/Estates/Probate Avoidance			
Name	Phone	Fax	E-Mail Address

Have you recently retained the services of a legal professional?

Bankruptcy, Divorce or other Legal Professional			
Name	Phone	Fax	E-Mail Address

Are you working with a Financial Professional for retirement planning? Yes No Please Refer Me.

Financial Planner			
Name	Phone	Fax	E-Mail Address

Do you work with a professional in the preparation of your taxes? Yes No Please Refer Me.

CPA / Tax Professional			
Name	Phone	Fax	E-Mail Address

Are you working with a real estate professional or can we refer one? Yes No Please Refer Me.

Real Estate Professional			
Name	Phone	Fax	E-Mail Address

I (We) hereby authorize the above referenced professionals to release any and all information requested by XXXXXXX Mortgage Corp. as needed to assist in the process of my loan application. I further understand that I am under no obligation to work with any referred professionals.

X _____ Date: _____
Borrower

X _____ Date: _____
Borrower