

Sales Finance Worksheet

Dealer		CASH code		Present Employment — Purchaser (2)			
Date	Merchandise purchased	App type (I or J)		Employer		Position	
Sales person handled by			Cash price		Department	Employer address	
Cash down		Trade-in	Amount requested	No. of months	Date employed (month/year)	Gross monthly income	Net monthly income
					\$	\$	\$
Follow-up / comments				Phone		Comments	

Personal

Purchaser (1) title	first name	initial	last name
Purchaser (2) title	first name	initial	last name
Marital status		Number of dependents (except spouse) — If paying child support, alimony, or child care, list below in accounts outstanding.	
1 Married	2 Unmarried		
Since _____	3 Separated		
Birthdate (1)	Social Security number (1)		
Birthdate (2)	Social Security number (2)		

Other Income

Source	Monthly gross	Monthly net
	\$	\$

Alimony, child support or separate maintenance income need not be revealed if purchaser does not wish to have it considered as a basis for repaying this obligation.

Auto

Year	Make and Model	C — Clear or N — Not clear

Bank

Account type C — Checking S — Savings	Bank Name / Location	Average Balance

Present Address

Street, box, RR

City state ZIP Date of address (month/year)

Phone County Years in state/area

Previous Address (If less than 3 years at present)

Street, box RR city state How long?

Housing status

1 — not a home buyer or owner	Purchase price of home	Current value	Balance owing	Down payment
2 — Buying or own house	\$	\$	\$	\$

Monthly payment / rent Mortgage company / landlord

Previous Employer (If less than 3 years at present)

Purchaser (1) employer	Position
Address How long?	
Purchaser (2) employer	Position
Address How long?	

Present Employment — Purchaser (1)

Employer	Position	
Department	Employer address	
Date employed (month/year)	Gross monthly income	Net monthly income
	\$	\$
Phone	Comments	

Nearest Relative (not living with purchaser)

Name

Address

Office Use Only

Accounts Outstanding — List all open accounts including home equity, auto, credit union and employer loans.

	Creditor / Location / Security	Open Date	Amount Purch / Borrowed	Balance Owed	Monthly Payment
<input type="checkbox"/> Approve \$					
<input type="checkbox"/> Offer credit card					
<input type="checkbox"/> Customer canceled					
<input type="checkbox"/> Turned down					
Reasons / conditions					
By	Date				