Me^2 RESIDENTIAL LOAN APPLICATION

Mail, email, or fax application form. Email:me2lenders@summitcreditunion.com;
Fax: 414-778-0237 ; Mail: Summit Credit Union 10015 W Greenfield Ave. Milwaukee, WI 53214

PRE-APPLICATION QUESTIONS

Are you looking to apply for a mortgage or refinance an existing mortgage? _____Yes ___X__No

Are you already a member of Summit Credit Union? _____Yes _____No

If NO to previous question: Do you currently live in Wisconsin? _____Yes _____No

APPLYING FOR A PERSONAL LOAN

What is your desired loan amount? _____ ($1,000-$15,000)

What is the loan term you want?

1 year (12 months) Min 3 year (36 month) 5 year (60 month)

7 year (84 months) 10 year (120 months) 15 year (180 months) Max

What is the general purpose of this loan? Me^2

Please provide a brief description of why you want this loan: Energy efficiency

PERSONAL INFORMATION

First Name: _____

Middle Name: _____

Last Name: _____ Suffix_____

SSN: _____

Date of Birth: _____/_____/_____

Marital Status: Married Registered Domestic Partner Separated Unmarried

Summit Credit Union Member Number: _____

Membership Duration: _____Year(s) _____Month(s)

Citizenship status: US Citizen Non-Permanent Resident Permanent Resident

CONTACT INFORMATION

Home Phone: _____

Work Phone: _____ Extension _____

Cell Phone: _____

Email: _____

Preferred Contact Method: Home Work Cell Email

CURRENT ADDRESS

Address: _____

City: _____MILWAUKEE_____ (*You must live in the City of Milwaukee to be eligible*)

State: _____WI_____

Zip Code: _____

Are you a homeowner? _____Yes _____No (*You must own your home to be eligible*)

How long have you lived there? _____Year(s) _____Month(s)

APPLICANT QUESTIONS

Will you be paying this loan with automatic payments? _____Yes _____No

Are you working 25 hours (or more) per week? _____Yes _____No

CO-APPLICANT OPTION

Will there be a co-applicant on this application? _____Yes _____No

EMPLOYMENT INFORMATION

Employment Status: Active Military Employed Government/DOD Homemaker Other

Owner Retired Retired Military Self-Employed Student Unemployed

Profession/Job Title: _____

Employer (If Employed): _____

Supervisor Name: _____

Length of Employment: _____Year(s) _____Month(s)

Years in Profession: _____Year(s)

EMPLOYER INFORMATION

Address: _____

City: _____

State: _____

Zip Code: _____

Phone: _____

MONTHLY INCOME INFORMATION

Gross Monthly Income: $_____

Other Income 1: $_____ Description: _____

Other Income 2: $_____ Description: _____

If you entered "Other Income", is it tax-exempt (e.g. Social Security benefits)? _____Yes _____No

Comments Regarding Income: _____

_____

**Alimony, child support, and separate maintenance income need not be revealed if you do not wish to have them considered as a basis for repaying this obligation.*

MONTHLY EXPENSE INFORMATION

Total Monthly Mortgage Payment: $_____

**If your mortgage payment does not include taxes, insurance, or HOA fees, please include that payment amount in "Other Expense Information" below.*

Job Expenses: $_____

Alimony: $_____

Separate Maintenance: $_____

Child Support: $_____

Tax Expense: $_____

OTHER EXPENSE INFORMATION

If you have received credit (loan, credit card, line of credit) at another financial institution within the last 60 days, please list your monthly payment and the name of the financial institution.

Other Expense 1: $_____ Description _____

Other Expense 2: $_____ Description _____

SIGNATURE

Applicant Signature: _____

Date: _____

HDMA – PROPERTY INFORMATION

Property Address: _____

City: _____Milwaukee_____

State: _____WI_____

Zip Code: _____

County: _____Milwaukee_____

Property Type: _____

Occupancy Status: ◯ Primary Residence ◯ Rental/Investment ◯ Second Home

INFORMATION FOR GOVERNMENT MONITORING PURPOSES

The following information is requested by the Federal Government for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal credit opportunity, fair housing and home mortgage disclosure laws. You are not required to furnish this information, but are encouraged to do so. The law provides that a lender may discriminate neither on the basis of this information, nor on whether you choose to furnish it. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or gender, under Federal regulations, this lender is required to note the information on the basis of visual observation or surname if you have made this application in person. If you do not wish to furnish the information, please check the box below. (Lender must review the above material to assure that the disclosures satisfy all requirements to which the lender is subject under applicable state law for the particular type of loan applied for.)

APPLICANT:

I do not wish to furnish this information: ☐

Gender: ◯ Female ◯ Male

Ethnicity: ◯ Hispanic or Latino ◯ Not Hispanic or Latino

Race: ◯ American Indian or Alaskan Native ◯ Asian ◯ Black or African American

◯ Native Hawaiian or other Pacific Islander ◯ White

Applicant Signature: _____

Date: _____