



CLIENT FINANCIAL & PURCHASING PROFILE

Initial Pre-Qualification & Option Analysis Tool (Estimated)



NOTICE & DISCLAIMER

This document is an informal intake tool used to collect self-reported financial information. It is strictly used to conduct preliminary purchasing estimates and option analysis. This is not a credit application and does not involve running a credit check. All estimates depend on the accuracy of the information provided.

Welcome! Please complete the fields below as accurately as possible so we can identify suitable properties and financing pathways.

1. Property Details (If Specific Property in Mind)

Property Address	Estimated Purchase Price (\$)
Community / Park Name	Monthly Land Lease / Space Rent (\$)

2. Employment & Gross Income Profile

Employment Type	Primary Job Title / Profession
☐ W-2 ☐ Self-Employed ☐ Retired	
Current Employer	Time at Current Job
Previous Employment (If under 2 years at current role)	
2025 Gross Income (W-2 Box 1 / 1099) (\$)	2024 Gross Income (W-2 Box 1 / 1099) (\$)
Additional Annual Income (Pension, Social Security, Bonus, Rental, etc.)	

3. Credit & Financial History (Self-Reported)

Estimated Credit Score	Recent Credit Challenges (Past 4 Years)
	☐ Late Payments (Mortgage / Rent / Auto)
	☐ Charge-offs / Collections
	☐ Bankruptcy / Foreclosure
Explanation of Credit Issues (Timeframe & Details)	



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4. Down Payment & Available Funds

Total Liquid Down Payment Available (\$)

Source of Funds

Savings

Investments

Gift

Sale

5. Monthly Expenses & Debts

Estimated Monthly Fixed Living Costs (\$)

Utilities, insurance, cell phone, groceries, etc.

Credit Card Minimum Payments - Total Monthly (\$)

Auto Loans / Leases - Monthly (\$)

Student Loans & Other Monthly Debts (\$)

NEXT STEPS

Once this assessment is completed, we will analyze your estimated debt-to-income (DTI) ratio, review community guideline requirements, and present tailored options and estimated purchasing thresholds. Please save the completed PDF and return it securely to Arthur Cervantes Properties, Inc.

Additional Notes (Optional)

CLIENT ACKNOWLEDGMENT

I confirm that the information above is self-reported and is provided solely for preliminary estimates and option analysis.

Client Name

Date