



BANK STATEMENT INCOME CALCULATION REQUEST

Lender Contact Information

Lender Company: _____ Requestor Name: _____
Requestor Email: _____ Requestor Phone: _____
Account Executive: _____ Loan number (if applicable): _____

Applicant Information

Borrower Full Name: _____ Last 4 Digits SSN: _____
Business Name: _____ Minimum 2 years Self-Employed? Yes No
Percent Ownership: _____% Business Expense Factor: _____%

Income Analysis

Submit the following documentation/information 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 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 serviced based): _____

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 of business names during the statement period: