

Home buying worksheet

Credit Report:

Things that need to be corrected:

	Creditor	Contact Info	Notes and details
1			
2			

Credit Score:

	Equifax	Experian	TransUnion
You			

PreApproval:

Amount:	\$	Comfort Amount:	\$
	Bank Name	Contact Name	Email & Telephone
1			
2			

Spending Matrix:

	Income Sources	Amount	Total
1		\$	
2		\$	
3		\$	
Total Income			
	Spending Areas (excluding housing)	Amount	Total
1	Automobile / Transportation	\$	
2	Credit Card	\$	
3	Insurance	\$	
4	Utilities	\$	
5	Loans & other recurring debt	\$	
6	Groceries	\$	
7	Fashion & Beauty	\$	
8	Travel & hobbies	\$	
9	Education / Family (childcare, etc.)	\$	
10	Other	\$	
Total Spending (excluding rent/mortgage)			\$
Total remaining for housing/mortgage			\$

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The House:

	Description	Must Have Now	Nice to Have	For the Future
SIZE:				
	Lot size / acreage			
	Square footage / Living Area			
	Bedrooms			
	Full Bathrooms			
	Half Bathrooms			
	Garage spaces			
FEATURES:				
Additional interior spaces and features:				
Exterior spaces and features:				
LOCATION:				
Town(s):				
School district:				
Neighborhood:				
Communiting distance:				
Other aspects:				

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Financial Success

Description	Now	1-2 years	2-5 years	5-10 years	10+ years
Family size					
Work / Income					
Spending					
Lifestyle / Travel / Hobbies					
Other factors					
Loan Life factors:					
BANK 1:					
Application fees					
Interest rate					
Points					
Closing costs					
Attorney requirements					
Loan requirements (classes, etc)					
Payment					
Interest paid					
Bank stability / holding of the note					
Other factors:					
BANK 2:					
Application fees					
Interest rate					
Points					
Closing costs					
Attorney requirements					
Loan requirements (classes, etc)					
Payment					
Interest paid					
Bank stability / holding of the note					
Other factors:					

Notes: