Personal loan application file

Organize the documents a lender asks you to provide.

DATE / QUOTE DATE

RECORD YOUR FIGURES AND QUESTIONS

Lender and application reference

Identity documents requested

Income documents requested

Address documents requested

Existing debt information

Missing documents and due dates

QUESTIONS TO RESOLVE

- [ ] Did the lender confirm its document list?
- [ ] Will documents be sent through an official channel?
- [ ] Have copies and submission dates been recorded?

NEXT ACTION / WHO TO CONTACT / FOLLOW-UP DATE

Official background: https://www.consumerfinance.gov/consumer-tools/

fintoku.com/resources/loan-library/

Use current written terms. This worksheet organizes your notes; it does not calculate approval or eligibility.