

Homeowner Info Sheet

Homeowner's Name	Homeowner's Name
Property Address	Primary Phone
City, State Zip	Secondary Phone
Email	Best Time to Contact

1) Explain your current financial situation: _____

2) Are you current with your payment? _____ # of months behind on payment _____

3) Has a notice of default filed? When? _____ Has a notice of trustee sale filed? When? _____

4) What is your goal? Keep Sell Walk Away Undecided

5) Which options have you tried? (Check all applicable)

- Loan Modification Refinance List Home with Realtor/MLS
 Forbearance Agreement Bridge Loan Bankruptcy
 Short Sale Lease Option Legal Action

6) When did you purchase the property? _____ What was the purchase price? _____

7) What is the value of the house now? _____ Property been refinanced? When? _____

8) Name of 1st lender _____

9) Circle the type of loan: 30-yr fixed, 5/1 ARM, negative amortization, other _____

10) What is the 1st loan balance? _____ Monthly mortgage on the 1st? _____

11) Interest rate on the 1st loan _____ Any back owed amount (arrear)? _____

12) Name of 2nd lender _____

13) Circle the type of loan: HELOC, 30-yr fixed, 5/1 ARM, negative amortization, other _____

14) What is the 1st loan balance? _____ Monthly mortgage on the 1st? _____

15) Interest rate on the 1st loan _____ Any back owed amount (arrear)? _____

16) Are there other liens (mechanics, IRS, HOA, water, garbage, etc)? _____

17) What is the household income? _____ What is the household expense? _____

18) Do you own any other real estate? _____