

Borrower Financial Worksheet

Loan#			
Borrower Name:		Last 4 Digits of SSN:	
Co-Borrower Name:		Last 4 Digits of SSN:	
Property Address:		Home Phone:	
City:	State:	Zip Code:	Cell/Work Phone:
Current Address (if different):		PO Box # (if applicable)	
City:	State:	Zip Code:	

Total number of dependents:
Have you contacted credit counseling services?
Is your home currently listed for sale? How long has it been on the market?
If yes, name & company of Real Estate agent:
How much money is currently available to put towards a workout program?

Borrower Employment Information	Co-Borrower Employment Information
Currently Employed? Yes <input type="checkbox"/> No <input type="checkbox"/>	Currently Employed? Yes <input type="checkbox"/> No <input type="checkbox"/>
How Long? _____	How Long? _____
Present Employer: _____	Present Employer: _____
Self-Employed Yes <input type="checkbox"/> No <input type="checkbox"/>	Self-Employed Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, Name of Company: _____	If yes, Name of Company: _____

Monthly Income			
Description	Borrower	Co-Borrower	Total
Net Salary/Wages	\$	\$	\$
Unemployment Income	\$	\$	\$
Child Support/Alimony	\$	\$	\$
Disability Income	\$	\$	\$
Rental Income	\$	\$	\$
Totals	\$	\$	\$

Assets/Liabilities-If you own real estate in addition to your personal residence, please attach a complete list of property addresses, Lender information, account numbers, monthly payment amount, amount owed, estimated value, & rental income.			
Description	Estimated Value	Amount Owed	Net Value
Personal Residence	\$	\$	\$
Personal Property (cars, jewelery, land, etc)	\$	\$	\$
Checking Accounts	\$	\$	\$
Savings Accounts	\$	\$	\$
IRA/401K/Keogh Accounts	\$	\$	\$
Stocks/Bonds/CD's	\$	\$	\$
Cash Value Life Insurance	\$	\$	\$
Other	\$	\$	\$
Totals	\$	\$	\$

Name of 1st Mortgage/Lien Holder:
Name of 2nd Mortgage/Lien Holder (if applicable):
Do you pay Property Taxes & Homeowner's Insurance premiums in your monthly payment? Y N
If no, how much do you pay monthly for Property Taxes? Homeowner's Insurance?

Borrower Financial Worksheet

Loan #				
Expenses				
Description	Monthly Payment	Balance Owed	Delinquent	Amount Delinquent
1st Mortgage/Lien Holder	\$	\$	Y / N	\$
2nd Mortgage/Lien Holder	\$	\$	Y / N	\$
Other Mortgage/Liens/Rents	\$	\$	Y / N	\$
Alimony/Child Support	\$	\$	Y / N	\$
Homeowners Association Dues	\$	\$	Y / N	\$
Child Care	\$	\$	Y / N	\$
Life/Health Insurance	\$	\$	Y / N	\$
Medical Bills/Prescriptions	\$	\$	Y / N	\$
Credit Card/Installment Loan	\$	\$	Y / N	\$
Credit Card/Installment Loan	\$	\$	Y / N	\$
Credit Card/Installment Loan	\$	\$	Y / N	\$
Credit Card/Installment Loan	\$	\$	Y / N	\$
Student Loan	\$	\$	Y / N	\$
Auto Loan	\$	\$	Y / N	\$
Auto Loan	\$	\$	Y / N	\$
Auto Expenses/Gasoline/Insurance	\$	\$	Y / N	\$
Food/Spending Money	\$	\$	Y / N	\$
Water/Power/Natural Gas	\$	\$	Y / N	\$
Sewer/Trash	\$	\$	Y / N	\$
Phone/Cell Phone	\$	\$	Y / N	\$
Cable/Satellite TV/Internet	\$	\$	Y / N	\$
Other	\$	\$	Y / N	\$
Totals	\$	\$	Y / N	\$

I understand and realize that the financial information being provided will be used by the lender and/or the insurer of my mortgage loan to analyze my options with respect to the mortgage loan. I further understand and acknowledge that any action taken by the lender and/or the insurer of my mortgage loan on my behalf will be made in strict reliance on the financial information provided herein. I understand by signing this financial worksheet that I am authorizing you as the lender to obtain a credit report.

By signing below, I/we certify that the information provided is true and correct to the best of my/our knowledge. In the event a third party is designated to assist on my/our behalf, I have included written authorization to the designee to assist on my/our behalf.

In the event that the loan can be brought current or the property can be sold for an amount sufficient to pay off the mortgage loan in full during the evaluation process, I understand that the request for participation on a loss mitigation program will be withdrawn without further action.

 X
 X

Borrower Signature Date
 Co-Borrower Signature Date

NOTICE- This is an attempt to collect a debt. Any information obtained will be used for that purpose. If your debt has been discharged in bankruptcy, our rights are being exercised against the collateral for the above mentioned account, not as a personal liability.