



HOMEOWNER INTAKE FORM

Date: _____

Borrower Name: _____ SS#: _____ DOB: _____

Loan Number: _____ Property Address: _____

City: _____ State: _____ Zip: _____ Number of people in household: _____

Is the property for sale? _____ Listing Date: _____ Price: \$ _____

Realtor Name: _____ Realtor Phone: _____

Borrower Occupied?: _____ Mailing Address if different: _____

Phone Numbers: Home: _____ Cell: _____ Work: _____

Best time to reach you and number to call?: _____

Email: _____ How long have you owned the home? _____

Gender: Male Female Marital Status: Single Married Divorced Widowed Other

Disabled?: Yes No Head of household? Yes No Race: _____

Co-Borrower Name: _____ SS#: _____ DOB: _____

Mailing Address: _____

Phone Numbers: Home: _____ Cell: _____ Work: _____

Counseling Information

First Mortgage Lender: _____ Type of Loan: _____ Interest Rate: _____

Loan Number: _____ Date You Closed Your Loan: _____

Second Mortgage Lender: _____ Type of Loan: _____ Interest Rate: _____

Loan Number: _____ Total Mortgage Payments Amount: \$ _____

Includes Taxes & Insurance: _____ Date of Last Payment: _____

Refinanced? Yes No If yes, when? _____

Primary Reason for Default: _____

Is the Loan in Bankruptcy?: Yes No If Yes, provide names, location of court, case number and attorney: _____

Assets:	Amount Owed	Value
Home	\$ _____	_____
Other Real Estate	\$ _____	_____
Retirement Funds	\$ _____	_____
Investments	\$ _____	_____
Checking	\$ _____	_____
Savings	\$ _____	_____
Other	\$ _____	_____

Automobile #1 Model: _____ Year _____ Amount Owed _____

Automobile #2 Model: _____ Year _____ Amount Owed _____

Monthly Income:	Start Date	Net Monthly Wage	Borrower Pay Days:
Name of Employers	Position		
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

Additional Income (Source)	Monthly Amount
1. _____	_____
2. _____	_____

How did you hear about us? _____