

IMPORTANT: PLEASE COMPLETE THIS ENTIRE FORM & ANSWER ALL THE QUESTIONS BELOW.

New Client Information & Intake Package

First Name: _____ Last Name: _____
Cell Phone: _____ Home Phone _____
Email: _____ Fax number: _____
Property Address: _____
Mailing Address: _____
Gross Monthly Income: \$ _____ Gross Monthly Expenses: \$ _____

Co-Borrower Information:

First Name: _____ Last Name: _____
Cell Phone: _____ Home Phone _____
Email: _____ Fax number: _____
Property Address: _____
Mailing Address: _____
Gross Monthly Income: \$ _____ Gross Monthly Expenses: \$ _____

Property Information: (Circle One)

Occupancy: Primary Residence 2nd Home Investment Property

Property Type: SRF Condo PUD 1-4 Units Other _____

Do you own more than one home? If yes, how many? _____

What is the value of your home today? _____

What is/are your current Mortgage Scenarios? (Circle One)

1st Lien Loan Type: Fixed Arm Interest Only Pay Option Arm Other _____
3 year Arm 5 year Arm 7 year Arm 10 year Arm

Term of Loan 30 years 15 years 40 due in 30 50 due in 30

Loan Balance: \$ _____ **Rate** _____ **Loan No.** _____

Current Lender: _____

2nd Lien: Loan Type: Fixed HELOC Interest Only Other _____

Term of Loan 30 years 15 years 15 due in 30

Loan Balance: \$ _____ **Rate** _____ **Loan No.** _____

Current Lender: _____

H.O.A. Fee (if applicable): \$ _____ Is HOA current? (Y / N) Are taxes & insurance included in your mortgage payment? (Y / N)

Please check off ALL Hardship Items that apply: () Divorce, () Unemployment, () Business Failure, () Illness, () Death of Spouse, () Payment Increase, () Other ~ explain: _____

Last Mortgage Payment date: ____/____/____ Have you received a foreclosure notice? (Y / N) Is a hearing or sale date scheduled? (Y / N)

Do you want to stay in the property? (Y / N) Is the property listed for rent or sale? (Y / N) Is the property currently vacant? (Y / N) Is the property in need of repairs? (Y / N) Have you spoken with a credit counselor? (Y / N) Have you filed for Bankruptcy in the past 8 years? (Y / N)