

Consultant Name: \_\_\_\_\_

Date: \_\_\_\_\_



## Initial Application for Loan Modification Clients

Client Name: \_\_\_\_\_

Client Name: \_\_\_\_\_

Property Address:

\_\_\_\_\_

Mailing Address:

\_\_\_\_\_

Property Type (Circle One):    Primary                  Second Home                  Investment

Number of Properties Owned: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Email Address (1): \_\_\_\_\_

Fax Number: \_\_\_\_\_

Email Address (2): \_\_\_\_\_

Nature of Hardship (Mandatory):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Currently Employed (Circle One):    Yes    No

Type (Circle One):    W2                  Self-Employed – Job Description: \_\_\_\_\_

How Long: \_\_\_\_\_

Total Monthly Household Income (Gross): \$ \_\_\_\_\_

Total Monthly Expenses: \$ \_\_\_\_\_

Total Assets: Checking Account/ Savings Account/ 401K Balance: \$ \_\_\_\_\_

Current Property Value: \$ \_\_\_\_\_

Consultant Name: \_\_\_\_\_

Date: \_\_\_\_\_

Value at Closing: \$ \_\_\_\_\_

Doc Type at Closing (Circle One):    Full        Stated        No Doc        Bank Statements

Date Loan Docs Signed: \_\_\_\_\_

Cash Out at Signing (Circle One):    Yes                      No

Number of Months Behind: \_\_\_\_\_

Date of Last Payment: \_\_\_\_\_

Foreclosure Date (if applicable): \_\_\_\_\_

Trustee Sale Date: \_\_\_\_\_

Lender: \_\_\_\_\_

Date Loan Closed: \_\_\_\_\_

1<sup>st</sup> Mortgage Original Loan Balance: \$ \_\_\_\_\_

1<sup>st</sup> Mortgage Current Loan Balance: \$ \_\_\_\_\_

Loan Type (Circle One):        Fixed                      ARM

Term (Circle One):    15        30        40        Other: \_\_\_\_\_

1<sup>st</sup> Mortgage Payment: \$ \_\_\_\_\_

Interest Rate: \_\_\_\_\_

Adjustment Date (if applicable): \_\_\_\_\_

2<sup>nd</sup> Mortgage Original Balance: \$ \_\_\_\_\_

2<sup>nd</sup> Mortgage Current Balance: \$ \_\_\_\_\_

Loan Type (Circle One):        Fixed                      ARM

Term (Circle One):    15        30        40        Other: \_\_\_\_\_

1<sup>st</sup> Mortgage Payment: \$ \_\_\_\_\_

Interest Rate: \_\_\_\_\_

Lender: \_\_\_\_\_

Have you tried to do a mod already? (Circle One):    Yes                      No

If so, how many times? \_\_\_\_\_

What is the maximum homeowner payment you are willing to make to stay in your home?  
\$ \_\_\_\_\_

Client Comments:

\_\_\_\_\_  
\_\_\_\_\_

Consultant Recommendation (Circle One):                      Loan Mod                      Short Sale

Consultant: \_\_\_\_\_ Date: \_\_\_\_\_

Consultant Contact Info: \_\_\_\_\_