

Client Financial Worksheet

**Is the amount owed greater than the property value?
Is the client 30 days or more late on their mortgage?**

Client Loan Number / Lender(1)
Client Loan Number / Lender(2)

Borrower Personal Information

Borrower Name
Home Phone Number
Work Phone Number Ext
Home Address
City ST, Zip
Email Address
SS# DOB

Co-Borrower Personal Information

Co-Borrower Name
Home Phone Number
Work Phone Number Ext
Home Address
City ST, Zip
SS# DOB

Property Information

How many people live in the house?
Is the house currently listed for sale?
What is your listing agent's name
What is your listing agent's phone number?
Is the property currently occupied?

Borrower Employment History

Currently employed?
How long with the same company?
Employer name
(If self-employed) Company name

Co-Borrower Employment History

Currently employed?
How long with the same company?