

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 _____ No _____		Currently Employed? Yes _____ No _____	
How Long? _____		How Long? _____	
Present Employer: _____		Present Employer: _____	
Self-Employed Yes _____ No _____		Self-Employed Yes _____ No _____	
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, jewelry, 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?	