

Worksheet for :

Property Address, City, State, Zip

1st Lender name 1st Loan #

Monthly Payment Loan Balance

Current Interest Rate Fixed Rate ? ARM Rate ?

Date of Last Monthly Payment Delinquent Amount

Tax Impounds per month Ins impounds per month

Notice of Default filed? Date: BK filed? Date:

Have you previously attempted a loan modification with this lender? Date:

Are you currently in a forbearance agreement with this lender? Date/Amount:

Do you want the lowest possible monthly payment including Interest Only options?

Do you want the lowest possible fixed interest rate?

2nd Lender name 2nd Loan #

Monthly Payment Loan Balance

Current Interest Rate Fixed Rate ? ARM Rate ?

Date of Last Monthly Payment Delinquent Amount

Tax Impounds per month Ins impounds per month

Notice of Default filed? Date: Text BK filed? Date:

Have you previously attempted a loan modification with this lender? Date:

Are you currently in a forbearance agreement with this lender? Date/Amount:

Do you want the lowest possible monthly payment including Interest Only options?

Do you want the lowest possible fixed interest rate?

Have you listed this property for sale? Is this property vacant?

Do you occupy this property? Do tenants occupy this property? Monthly rent paid

List all other properties you own including time shares,:

Property #1

Property #2