

HOMEOWNER PROFILE WORKSHEET

HOMEOWNER INFORMATION

Homeowner Name(s): _____

Address: _____

Home Phone: _____ Work Phone: _____ Alt Phone: _____

Marital Status: ☐ Single ☐ Married ☐ Divorced # of Kids: _____ Ages: _____

Occupation: _____ Employer: _____

Referral Source: _____ Why did you call? _____

LOAN INFORMATION

Warranty Deed Name(s): _____

Lender's Name: _____

Lender's Address: _____

Loan Balance: \$ _____ Interest Rate: % _____ # of months behind: _____

Loan Type: ☐ Conventional ☐ Non-Conf ☐ FHA ☐ VA ☐ Private ☐ Other

Do you have any: ☐ Second Mortgages ☐ Tax Liens ☐ Mechanic's Liens

What is your estimate of the value? Source? _____

Monthly Pmt: \$ _____ Principal: _____ Interest: _____

Home in Foreclosure? _____ Sale Date: _____ Redemption Period: _____

Why are you in Foreclosure? _____

HOMEOWNER ACTION STEPS

Have you been in foreclosure before? ☐ Yes ☐ No Listed it for sale? ☐ Yes ☐ Yes

Have you ever filed bankruptcy? ☐ No ☐ Chapter 7 ☐ Chapter 13

Bankruptcy Details: ☐ Currently in ☐ Discharged on: _____

Others you have consulted: ☐ Lender ☐ Attorney ☐ Realtor
☐ Accountant ☐ Others: _____

What was their advice? _____

What would you like to happen? _____

Best resolution: ☐ Cash Buy ☐ Finance ☐ Assumption ☐ Short Sale ☐ Rental ☐ Other