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Intake Assistance Form

1. Full legal name of property owners and address (and legal description, if available) of property.
2. How long have you owned the home?
3. What was the original loan amount?
4. What were your original monthly mortgage payment amounts?
5. Who is the original mortgage currently with?
6. Have you refinanced the home at any time since the original mortgage? If so, when, how much (full finance and new monthly mortgage payment amount) and with who?
7. Are you currently in default on the mortgage, how much, last payment date of payment made, any partial payments made?
8. If you are in default on the loan please explain what financial hardship put you in default? What caused financial difficulty that lead to inability to make the mortgage payments? Please describe any hardship.
9. Have you communicated to the bank about your default, discussed hardship and possible options? Who initiated the contact, you or the bank?
10. Have you ever applied for a loan modification with the bank directly?

11. How many times did you apply for a loan modification (provide the specific dates of each application, the specific documents and information YOU provided as part of your application, and specifically how you submitted the full application including the verification documents? What did the bank provide in response to your applications?
12. Did the bank inform you or send you any correspondence qualifying or denying your application for modification? What information did the bank provide to you regarding eligibility or a final decision regarding your mortgage?
13. What is your current monthly income? Have you had any increase/decrease in income or expenses in the last 6 months?
14. What is the current outstanding Mortgage balance due on the property? What is the value of the Property?
15. What can you afford in terms of a monthly Mortgage payment?
16. Do you have a second mortgage (or any subsequent other mortgages) taken out on the home? What were the monthly mortgage payments on the second mortgage?
17. What is the full **original** loan amount on the second mortgage? What is the **remaining** balance due on the second mortgage? Who is the second mortgage currently with?
18. What do you wish to do about your second mortgage? Please provide an affordable monthly estimate you can pay on the second mortgage (if any).
19. Are there currently any other debts that play a large role in your financial situation? (i.e. taxes owed, etc.)
20. Other: _____