

## **Loan Modification-Questionnaire:**

### **Personal Information:**

Name \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

County \_\_\_\_\_ State: \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Mobile: \_\_\_\_\_ E-mail: \_\_\_\_\_

Preferred method of contact: \_\_\_\_\_

Spouse's Name \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

County \_\_\_\_\_ State: \_\_\_\_\_ Zip Code \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Mobile: \_\_\_\_\_ E-mail: \_\_\_\_\_

Preferred method of contact: \_\_\_\_\_

### **Property Information:**

Location: \_\_\_\_\_ Description: \_\_\_\_\_

Owner Occupied? \_\_\_\_\_

**Lender Information:**

**1<sup>st</sup> Bank/Servicer:** \_\_\_\_\_ **Loan #** \_\_\_\_\_

**Current Loan Balance:** \_\_\_\_\_ **Interest rate** \_\_\_\_\_

**Date Loan commenced** \_\_\_\_\_ **Term of Loan:** \_\_\_\_\_.

**Address of Lender:** \_\_\_\_\_

**Contact/ bank representative (if known)** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**E-mail (if known):** \_\_\_\_\_

**Is this Loan guaranteed by Freddie Mac or Fannie Mae?** \_\_\_\_\_

**Are you current on your mortgage payments ? YES –NO, if NO, Please answer the following questions.**

1. **When did you stop making payments?** \_\_\_\_\_.
2. **Why did you stop making payment?** \_\_\_\_\_  
\_\_\_\_\_
3. **Have you received a Summons & Complaint YES-NO, if YES, please list Index number (located at the top right hand corner of summons)** \_\_\_\_\_
4. **Have you applied for a modification? YES-NO, If YES,**
  - a) **Date you applied for a modification** \_\_\_\_\_
  - b) **Outcome of your modification request** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2<sup>ND</sup> Bank/Service:** \_\_\_\_\_ Loan # \_\_\_\_\_

Current Loan Balance: \_\_\_\_\_ Interest rate \_\_\_\_\_

Date Loan commenced \_\_\_\_\_ Term of Loan: \_\_\_\_\_.

Is this a home equity loan? \_\_\_\_\_ Address of Lender: \_\_\_\_\_

\_\_\_\_\_

Contact/ bank representative (if known) \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail (if known): \_\_\_\_\_

Is this Loan guaranteed by Freddie Mac or Fannie Mae? \_\_\_\_\_

Are you current on your mortgage payments ? YES –NO, if NO, Please answer the following questions.

1. When did you stop making payments? \_\_\_\_\_

2. Why did you stop making payment? \_\_\_\_\_

\_\_\_\_\_

3. Have your received a Summons & Complaint YES-NO, if YES, please list Index number (located at the top right hand corner of summons) \_\_\_\_\_

4. Have you applied for a modification? YES-NO, If YES,

a) Date you applied for a modification \_\_\_\_\_

b) Outcome of your modification request \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**BORROWER- Monthly Income**

1. Employment Income: \_\_\_\_\_

Do you receive a W-2 for this income? \_\_\_\_\_

2. Self-employment Income \_\_\_\_\_

Do you have financial statements or tax returns that show this income? \_\_\_\_\_

3. Other earned income (e.g., bonus, commission, fee, housing allowance, tips, overtime): \_\_\_\_\_

Please describe \_\_\_\_\_

Can you document this income? \_\_\_\_\_

4. Benefit Income (e.g., social security, disability, workers compensation death benefits, pension, public assistance, adoption assistance) \_\_\_\_\_

Please describe \_\_\_\_\_

5. Unemployment Benefits: \_\_\_\_\_

6. Rental income. \_\_\_\_\_

Is there a lease? \_\_\_\_\_

Do you claim this income on your tax return? \_\_\_\_\_

Do you deposit the rental payments in your bank account? \_\_\_\_\_.

7. Child Support/ Alimony \_\_\_\_\_

**CO-BORROWER- Monthly Income:**

1. Employment Income: \_\_\_\_\_

Do you receive a W-2 for this income? \_\_\_\_\_

2. Self-employment Income \_\_\_\_\_

Do you have financial statements or tax returns that show this income? \_\_\_\_\_

3. Other earned income (e.g., bonus, commission, fee, housing allowance, tips, overtime): \_\_\_\_\_

Please describe \_\_\_\_\_

Can you document this income? \_\_\_\_\_

4. Benefit Income (e.g., social security, disability, workers compensation death benefits, pension, public assistance, adoption assistance) \_\_\_\_\_

Please describe \_\_\_\_\_

5. Unemployment Benefits: \_\_\_\_\_

6. Rental income. \_\_\_\_\_

Is there a lease? \_\_\_\_\_

Do you claim this income on your tax return? \_\_\_\_\_

Do you deposit the rental payments in your bank account? \_\_\_\_\_.

7. Child Support/ Alimony \_\_\_\_\_

**Monthly Household Expenses/debt:** (estimated)

1. First Mortgage: \_\_\_\_\_

2. Second Mortgage: \_\_\_\_\_

3. Insurance: \_\_\_\_\_

4. Property tax: \_\_\_\_\_

5. Credit Cards/ Installment Loans(s): \_\_\_\_\_

6. Alimony/ Child Support: \_\_\_\_\_

7. Net Rental Expense: \_\_\_\_\_

8. HOA/Condo Fees/ Maintenance: \_\_\_\_\_

9. Car Payments: \_\_\_\_\_

10. Auto Insurance: \_\_\_\_\_

11. Auto Expenses: \_\_\_\_\_

12. Medical Insurance: \_\_\_\_\_

13. Other:

13.1. \_\_\_\_\_

13.2. \_\_\_\_\_

13.3. \_\_\_\_\_

13.4. \_\_\_\_\_

Additional Information that you feel is relevant to your situation:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Questions/Concerns:

\_\_\_\_\_  
\_\_\_\_\_