

CONSULTATION INTAKE

Client Information Sheet (CIS)

Agent Name _____ Date _____ Trustee/Plaintiffs Attorney _____

State _____ County _____ Delinquent Foreclosure

Date Notice of Default Received (if applicable): _____ Date of Notice of Sale (if applicable): _____

Date Summons Received: _____ Date sent _____ Case # _____

Borrower _____ Co-Borrower _____

Address _____ City _____ St _____ Zip _____

Bwr Phone _____ Cell Phone _____ CoBwr phone _____

Email _____ Best Contact Hours by phone _____

Subj Prop Address _____ City _____ St _____ Zip _____

Lender(s) Name: 1st _____ 2nd _____

Est. Value of Home \$ _____ Mortgage Balance \$ _____ 1st Mtg Payment \$ _____

Current 1st Mortgage Origination Date _____ Original 1st Mtg Loan Amount _____

Mtg Balance \$ _____ 2nd Mtg Payment \$ _____ Months Late on 1st _____ 2nd _____

1st Mortgage Interest Rate ____% \$ past due: _____ 2nd Mtg Interest Rate ____% \$ past due _____

Monthly Inc _____ Monthly Exp _____

Previous lender issues/mod: _____

Hardship Information, Goal of Assistance and Additional Information: _____

Do you have an Attorney?

Have you ever filed for bankruptcy?

What chapter of BK did you file (if applicable)?

What is the present status of your BK (if applicable)

SALE REVERSAL/DELAY QUESTIONNAIRE

(If you cannot remember or N/A just leave blank)

Lender Name: _____

Lender Loan/Account #: _____

Borrower Name: _____

Borrower Phone Number: _____

Borrower Email Address: _____

Borrower Mailing Address:

Case Number: _____

Auction Amount \$ _____ (If you know how much the property sold for at auction, enter here.)

Date Property Was Sold or Scheduled Sale Date _____

Full Address and County of Property: _____

Is the person seeking this service an original debtor under the note, and are all parties subject to the foreclosed note willing to cooperate with the sale reversal / delay process?

Are you able or will you be able to make a modified monthly payment once the property has been returned to your name on title?

Have you already had your mortgage documents audited for federal and/or state law violations?

Balance Amount of Mortgage: \$ _____

What is the status of the property?

(Options: Owned By Bank or Owned By a 3rd Party)

Is this a Cash for Keys, Deed in Lieu or Short Sale?

Do you have possession of the property?

What date was the last bankruptcy discharged or dismissed (if applicable)?

Any pending eviction notices or eviction dates?

What are your goals?

Official Use Only -- Affiliate ID/Name: _____