

**1. Loan Information**

\_\_\_\_\_  
Servicer's Loan Number

\_\_\_\_\_  
Property Address

Are there other liens on the property?  Yes  No

\_\_\_\_\_  
If there are liens, who holds them? (list institutions)

\_\_\_\_\_  
Circumstances that led to your payment troubles

\_\_\_\_\_  
City                      \_\_\_\_\_  
State                      \_\_\_\_\_  
Zip

Is your home listed for sale?  Yes  No

\_\_\_\_\_  
Agent's Name                      \_\_\_\_\_  
Agent's Number

**2. Borrower Information**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Mailing Address (if different from property address)

\_\_\_\_\_  
Total number of persons living with Borrower

Home phone    -    -

\_\_\_\_\_  
Employer

SSN    -   -

\_\_\_\_\_  
City                      \_\_\_\_\_  
State                      \_\_\_\_\_  
Zip

\_\_\_\_\_  
Number of dependents living with Borrower

Work phone    -    -

\_\_\_\_\_  
Occupation

**3. Co-Borrower Information**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Mailing Address (if different from property address)

\_\_\_\_\_  
Total number of persons living with Co-Borrower

Home phone    -    -

\_\_\_\_\_  
Employer

SSN    -   -

\_\_\_\_\_  
City                      \_\_\_\_\_  
State                      \_\_\_\_\_  
Zip

\_\_\_\_\_  
Number of dependents living with Co-Borrower

Work phone    -    -

\_\_\_\_\_  
Occupation

**4. Borrower Monthly Income**

Gross Wages:	\$
-----	-----
Unemployment Income:	\$
-----	-----
Child Support / Alimony:	\$
-----	-----
Disability Income:	\$
-----	-----
Rental Income (Include rental agreement):	\$
-----	-----
Other (Describe):	\$
-----	-----
<b>Less:</b> Federal & State Tax, FICA:	-\$
-----	-----
<b>Less:</b> Other Deductions (401K, etc.):	-\$
-----	-----
<b>TOTAL</b>	<b>\$</b>

**5. Co-Borrower Monthly Income**

Gross Wages:	\$
-----	-----
Unemployment Income:	\$
-----	-----
Child Support / Alimony:	\$
-----	-----
Disability Income:	\$
-----	-----
Rental Income (Include rental agreement):	\$
-----	-----
Other (Describe):	\$
-----	-----
<b>Less:</b> Federal & State Tax, FICA:	-\$
-----	-----
<b>Less:</b> Other Deductions (401K, etc.):	-\$
-----	-----
<b>TOTAL</b>	<b>\$</b>

## 6. Monthly Expenses—All Borrowers

Mortgage Payment:	\$
Other Mortgages / Liens / Rents:	\$
Auto Loan(s):	\$
Auto Maintenance / Gas / Insurance:	\$
Credit Cards and Installment Loans:	\$
Health Insurance (Non-payroll deducted):	\$
Medical (Non-payroll deducted):	\$
Food:	\$
Child Care / Child Support / Alimony:	\$
Life Insurance:	\$
Water / Sewer / Utilities / Phone:	\$
Spending Money:	\$
Other (Describe):	\$
<b>TOTAL</b>	<b>\$</b>

## 7. Assets and Liabilities—All Borrowers

Checking Account(s):	\$
Savings / Money Market:	\$
Stocks / Bonds / CD(s):	\$
IRA / Keogh Account(s):	\$
401K / ESOP Account(s):	\$
Home:	\$
Other Real Estate:	\$
Cars With No Liens:	\$
Other (Describe):	\$
<b>TOTAL</b>	<b>\$</b>

## 8. Signature

I (we) agree that the financial information provided is an accurate statement of my (our) financial status. I (we) understand and acknowledge that any action taken by the lender of my (our) mortgage loan on my (our) behalf will be made in strict reliance on the financial information provided. My (our) signature(s) below grants the holder of my (our) mortgage the authority to confirm the information I (we) have disclosed in this financial statement, to verify that it is accurate by ordering a credit report and to contact my real estate agent and/or credit counseling representative (if applicable). By signing below, I (we) advise you that if I (we) should hereafter agree to a repayment plan for my (our) mortgage loan, reinstate my (our) mortgage loan, or pay off my (our) loan in full then, by doing so and without the necessity of any further action on my (our) part, I (we) hereby expressly withdraw this request for a loan workout. In that event, I (we) hereby direct you to take no further action to process this request for a workout.

\_\_\_\_\_  
Borrower's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Borrower's Signature

\_\_\_\_\_  
Date

**Please sign and date this form after you've completed it and fax to us at 904.281.2337. Be sure to include copies of your two most recent pay stubs, and bank statements of your checking and/or savings account. If you are self-employed, attach a copy of the past six month's profit and loss statement.**

