

Payment Worksheet



Financial Overview	
Borrower	
Address	
City, State, Zip	
Home Phone	
Work Phone	
Cell Phone	
# in Household	
Length of Ownership	___ yrs ___ months
Co-Borrower	
Address	
City, State, Zip	
Home Phone	
Work Phone	
Cell Phone	
# in Household	
Length of Ownership	___ yrs ___ months

Property Information		
Loan #		
Property for Sale	<input type="checkbox"/> yes <input type="checkbox"/> no	
Listing Date/Price		
Realtor Name		
Realtor Phone		
Assets	Amount Owed	Value
Home	\$	\$
Real Estate (Other)	\$	\$
Checking		\$
Savings		\$
Investments		\$
Retirement		\$
Auto 1	Model _____ Year _____	\$
Auto 2	Model _____ Year _____	\$
Auto 3	Model _____ Year _____	\$

Income Overview	
Employer	Gross Monthly Wage
	\$
	\$
	\$
Additional Income* - alimony/child support/etc.	Monthly Amount
	\$
	\$

* Additional income does not need to be reviewed if you do not choose to have it considered for approval of a payment workout.

Expense Overview	
Monthly Expense	Monthly \$ Amount
Mortgage	\$
2nd Mortgage	\$
Auto Payment(s) # _____	\$
Auto Insurance	\$
Auto Maintenance/Fuel	\$
Credit Card Payments	\$
Installment Loan Payments	\$
Child Support/Alimony	\$
Day Care/Child Care/Tuition	\$
Food	\$
Utilities	\$
Telephone	\$
Cable	\$
Medical	\$
Home/Condo Association Dues	\$
Spending Money	\$
Other Misc Expenses	\$

Description of Hardship

Please answer the following questions to help us better understand your current situation:

What caused you fall behind on your payments?

Can you make a down payment toward a resolution plan?

yes no If yes, how much? _____

How and when will your situation change in the future?

Best time to contact: _____ am pm

Preferred method of contact: phone email

Email address: _____

I agree that the financial information provided is an accurate statement of my financial status and by signing, I authorize the mortgage servicer to order a credit report, verify any employment, bank account or assets and release any information concerning the above.

Please sign and date (required):

Borrower signature _____ / /

Co-Borrower signature _____ / /