

Financial Worksheet for Loss Mitigation Workout

<i>Loan#:</i>		<i>Bank Name:</i>	
<i>Borrower SS#:</i>		<i>Borrower Name:</i>	
<i>Res. Tel.#:</i>	<i>Wk#:</i>	<i>Cell#:</i>	
<i>Co-Borrower SS#:</i>		<i>Co-Borrower Name:</i>	
<i>Res. Tel#</i>	<i>Wk#:</i>	<i>Cell#:</i>	
<i>Property Address:</i>			
<i>City:</i>	<i>State:</i>	<i>Zip Code:</i>	
<i>Current Address (if different from property address – Do not use Post Office Box):</i>			
<i>City:</i>	<i>State:</i>	<i>Zip Code:</i>	

Total number of dependents: _____
Is your home listed for sale? _____

Have you contacted credit-counseling services? _____
If yes, who is your agent? _____

Borrower Employment History	Co-Borrower Employment History
<i>Currently Employed?</i> <input type="radio"/> <i>Yes</i> <input type="radio"/> <i>No</i> <i>How Long?</i> _____ <i>Present Employer:</i> _____ <i>Position/Title:</i> _____ <i>If self-employed, name of Co.:</i> _____	<i>Currently Employed?</i> <input type="radio"/> <i>Yes</i> <input type="radio"/> <i>No</i> <i>How Long?</i> _____ <i>Present Employer:</i> _____ <i>Position/Title:</i> _____ <i>If self-employed, name of Co.:</i> _____

MONTHLY INCOME			
Description	Borrower	Co-Borrower	Total
<i>Social Security</i>	\$	\$	\$
<i>Net Salary/Wages</i>	\$	\$	\$
<i>Unemployment Income</i>	\$	\$	\$
<i>Child Support/Alimony</i>	\$	\$	\$
<i>Disability Income</i>	\$	\$	\$
<i>Rental Income</i>	\$	\$	\$
<i>Commissions/Bonuses</i>			
<i>Overtime</i>			

EXPENSES				
Description	Monthly Payment	Balance Due	Delinquent	
			YES	NO
<i>Other Mortgages/Liens/Rents</i>	\$	\$		
<i>Alimony/Child Support</i>	\$	\$		
<i>Homeowner's Association Dues</i>	\$	\$		
<i>Child Care</i>	\$	\$		
<i>Health Insurance</i>	\$	\$		
<i>Medical</i>	\$	\$		
<i>Credit Card/Installment Loans</i>	\$	\$		
<i>Auto Loan(s)</i>	\$	\$		
<i>Auto Expenses/Gasoline/Insurance</i>	\$	\$		
<i>Food/Spending Money</i>	\$	\$		
<i>Water & Sewer</i>	\$	\$		
<i>Gas, Electric & Oil</i>	\$	\$		
<i>Telephone</i>	\$	\$		
<i>Pet Expenses</i>	\$	\$		
<i>Child/Dependent/Elderly Care</i>	\$	\$		
<i>Student Loans</i>	\$	\$		
<i>Cell Phone & Internet</i>	\$	\$		
TOTAL	\$	\$		

ASSETS/LIABILITES – If you own real estate in addition to your personal residence, please attach a complete list of: Property addresses/name(s) of Lender/Lenders address and phone number/account numbers/monthly payment/amount owed/estimated value & rental income.

Description	Estimated Value	Amount Owed	Net Value
<i>Personal Residence</i>	\$	\$	\$
<i>Personal Property</i>	\$	\$	\$
<i>Checking Accounts</i>	\$	\$	\$
<i>Savings Accounts</i>	\$	\$	\$
<i>IRA/401K/Keogh Accounts</i>	\$	\$	\$
<i>Stock/Bonds/CD's</i>	\$	\$	\$
<i>Cash Value of Life Insurance</i>	\$	\$	\$
<i>Other</i>	\$	\$	\$
TOTAL	\$	\$	\$

By signing below, I/we verify that the information and documentation provided is true and correct to the best of my/our knowledge. In the event a third party is designated to act on my/our behalf, I/we have included written authorization to the designee to act on my/our behalf.

_____ **Dated:** _____

_____ **Dated:** _____