

# Payment Worksheet



| Financial Overview  |                    |
|---------------------|--------------------|
| <b>Borrower</b>     |                    |
| Address             |                    |
| City, State, Zip    |                    |
| Home Phone          |                    |
| Work Phone          |                    |
| Cell Phone          |                    |
| # in Household      |                    |
| Length of Ownership | ___ yrs ___ months |
| <b>Co-Borrower</b>  |                    |
| 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 \_\_\_\_\_ / /