

# Mortgage Note Worksheet

## SUBMISSION INFORMATION:

Name of Submitter: \_\_\_\_\_ Email: \_\_\_\_\_  
Telephone Number for us to call: \_\_\_\_\_ Select your Position: \_\_\_\_\_

Name of Note Holder: \_\_\_\_\_  
Street address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Fax: \_\_\_\_\_ Pager/Cell: \_\_\_\_\_  
Note Holder's Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

## Real Estate Information

Street address: \_\_\_\_\_ County: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Current estimated value: \$ \_\_\_\_\_ Based on: \_\_\_\_\_  
 Residential                       Single-family                       Multi-family (2-4 units)  
 Commercial                       Owner-occupied                       Rental  
 Vacant land                      Type: \_\_\_\_\_  
Acreage & Improvements: \_\_\_\_\_

Description of Property & Area:

## Payor Information:

Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_  
Credit Rating: \_\_\_\_\_

## Historical Information

Security Instrument:    \_\_\_ Contract                      \_\_\_ Deed of Trust/Note                      \_\_\_ Mortgage/Note  
Lien Position:            \_\_\_ 1<sup>st</sup>    \_\_\_ 2<sup>nd</sup>    \_\_\_ 3<sup>rd</sup>  
Date of sale                      \_\_\_\_\_                      First lien                      \$ \_\_\_\_\_  
Selling price                      \$ \_\_\_\_\_                      Second lien                      \$ \_\_\_\_\_  
Down payment                      \$ \_\_\_\_\_

## Note Information

Date of note                      \_\_\_\_\_                      How much money are you seeking? \$ \_\_\_\_\_  
Amount                      \$ \_\_\_\_\_  
Term in months                      \_\_\_\_\_ A)                      \_\_\_\_\_ (B)                      When do you want the money? \_\_\_\_\_  
Payment amount                      \$ \_\_\_\_\_  
Balloon amount                      \$ \_\_\_\_\_                      Will there be any payoffs at closing?    \_\_\_ Yes \_\_\_ No  
Balloon date                      \_\_\_\_\_  
Interest rate                      \_\_\_\_\_ %                      If so, what are the amounts? \$ \_\_\_\_\_  
Due date 1st pmt                      \_\_\_\_\_                      \$ \_\_\_\_\_  
# of pmts paid                      \_\_\_\_\_                      \$ \_\_\_\_\_  
#of pmts left                      \_\_\_\_\_  
Next pmt due                      \_\_\_\_\_  
Balance                      \$ \_\_\_\_\_

Why is the note being sold?