

Workout Plan Worksheet

Homeowner Information

Referral Source _____ 1st Mortgage Loan # _____

Date _____ Housing Counselor _____

Borrower _____

Borrower SSN _____ Borrower DOB _____

Address _____

City _____ State _____ Zip Code _____

Phone (home) _____ (cell) _____ (work) _____

Email Address _____

Borrower Employer _____

Borrower Job Title _____ How Long? _____

Co-Borrower _____

Co-Borrower SSN _____ Co-Borrower DOB _____

Address _____

City _____ State _____ Zip Code _____

Phone (home) _____ (cell) _____ (work) _____

Email Address _____

Co-Borrower Employer _____

Co-Borrower Job Title _____ How Long? _____

Number of Occupants in Household 18 & over _____ Number of Children under 18 _____

Property Address _____

Property Purchase Date _____

1ST MORTGAGE COMPANY

Loan # _____

Name: _____

Normal monthly payment: \$ _____ Current Interest Rate _____ %

Last month a payment was sent and accepted: _____

Total Months past-due: _____ Total of past-due payments \$ _____

Outstanding Principal Balance \$ _____

TYPE OF LOAN: (Please check all that apply)

_____ FHA _____ VA _____ RURAL DEVELOPMENT

_____ ASSUMED _____ CONTRACT FOR DEED

_____ Insured CONVENTIONAL _____ Uninsured CONVENTIONAL

_____ MOBILE HOME LOAN (age of home: _____)

TERMS OF LOAN: _____ FIXED RATE _____ ADJUSTABLE RATE

_____ 30 YEAR MTG _____ 15 YEAR MTG

Are Taxes and Insurance included in your mortgage payment? _____ YES _____ NO

If NO. Are your Taxes current: _____ YES _____ NO

Is your Insurance current: _____ YES _____ NO

2ND MORTGAGE COMPANY

Loan # _____

Name: _____

Normal monthly payment: \$ _____ Current Interest Rate _____ %

Last month a payment was sent and accepted: _____

Total Months past-due: _____ Total of past-due payments \$ _____

Outstanding Principal Balance \$ _____

ASSOCIATION DUES OR 3RD MORTGAGE

Loan # _____

Name: _____

Normal monthly payment: \$ _____ Current Interest Rate _____ %

Last month a payment was sent and accepted: _____

Total Months past-due: _____ Total of past-due payments \$ _____

Outstanding Principal Balance \$ _____