



Listing Intake Sheet

Subject property address: \_\_\_\_\_

Purchase price: \$ \_\_\_\_\_ Date of purchase: \_\_\_\_\_

Has property been refinanced? [ ] yes [ ] no If yes, date: \_\_\_\_\_

Number of title holders: \_\_\_\_\_ Full name(s) of all title holders: \_\_\_\_\_

Number of borrowers on loan: \_\_\_\_\_ Full name(s) of all borrowers on loan(s): \_\_\_\_\_

Mailing address of borrowers if other than subject property address: \_\_\_\_\_

Phone numbers: Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Business: \_\_\_\_\_

Email address: \_\_\_\_\_

List liens and encumbrances against the property including name of lien holder(s), loan number, principal balance, arrearages, fees and prepayment penalties:

First lien holder: \_\_\_\_\_ Principal balance: \$ \_\_\_\_\_ Loan # \_\_\_\_\_

Monthly payment: \$ \_\_\_\_\_ Prepayment Penalty: \$ \_\_\_\_\_

Second lien holder: \_\_\_\_\_ Principal balance: \$ \_\_\_\_\_ Loan # \_\_\_\_\_

Monthly payment: \$ \_\_\_\_\_ Prepayment penalty: \$ \_\_\_\_\_

Home equity or other loans: \$ \_\_\_\_\_ Principal balance: \$ \_\_\_\_\_

Monthly payment: \$ \_\_\_\_\_ Prepayment penalty: \$ \_\_\_\_\_

Mechanics liens: \$ \_\_\_\_\_ Judgments: \$ \_\_\_\_\_

Federal tax lien: \$ \_\_\_\_\_ State tax lien: \$ \_\_\_\_\_

Property taxes current: [ ] yes [ ] no If no, specify amount owed: \$ \_\_\_\_\_

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Home Owners Association dues current:  yes  no      If no, specify amount owed: \$\_\_\_\_\_

Other liens or encumbrances:  yes  no      If yes \$\_\_\_\_\_

Subject property:  owner occupied  tenant occupied  other \_\_\_\_\_

Notice of Default recorded against the property:  yes  no      If yes, date \_\_\_\_\_

Notice of foreclosure sale:  yes  no      If yes, date \_\_\_\_\_

Are your loan payments current  yes  no      If no, date of last payment \_\_\_\_\_

Have you discussed alternatives to foreclosure with your lender(s):  yes  no

Attempted/discussed loan modification:  yes  no

If yes, when: \_\_\_\_\_      With whom: \_\_\_\_\_

Filed bankruptcy:  yes  no.      If yes date: \_\_\_\_\_

If the proceeds from your sale are insufficient to clear the debt are you interested in pursuing a short sale?  yes  no

Have you consulted with financial and legal advisors regarding your options, rights, risks, tax and credit consequences with respect to all of the above?  yes  no

If yes date \_\_\_\_\_      With whom: \_\_\_\_\_

Seller acknowledges that the information above is true and correct to the best of seller's knowledge.

Seller: \_\_\_\_\_      Date: \_\_\_\_\_

Seller: \_\_\_\_\_      Date: \_\_\_\_\_