



## Financial Information Worksheet

In the event that you have difficulty making or are already delinquent in your mortgage payment, we would like to speak to you about various assistance options that may be available to you. We want to make the option evaluation process **simple and without causing you any unnecessary stress**. We're here to work with you to find a solution that makes sense for both of us.

We have streamlined the option evaluation process dramatically so that we need limited pieces of information in order to evaluate your options. And even better, the entire conversation should take about 15 minutes of your valuable time.

**IMPORTANT: Be as accurate as possible in completing this worksheet.** Any changes that we make to your loan to help you with your payments will require that you provide us documentation (such as pay stubs, W-2, tax returns, additional expense detail).

### ➔ Fill in the required information numbered ❶ through ❻

❶ Loan Number \_\_\_\_\_

❷ Are you currently employed, whether at a job or self-employment?  Yes  No

Monthly Salary & Wages	\$ _____	}	Add Together to Get:
Monthly Commissions & Bonuses	\$ _____ +		
Monthly Self Employment Income	\$ _____ +		
Monthly Alimony & Child Support*	\$ _____ +		
Monthly Pension & Social Security	\$ _____ +		
Monthly Rental Income	\$ _____ +		
			Monthly Income Before Taxes and Deductions
			\$ _____ ❸
			* Received

❹ Number of Bedrooms in Your Home \_\_\_\_\_

*Include the number of bedrooms, whether or not the rooms are used for that purpose.*

❺ Number of People in Your Household \_\_\_\_\_

*Include any dependents for which you are financially responsible, whether they are living in your home or not. In most cases, this number should match your tax exemptions, line 6d of IRS Form 1040.*

❻ Do you have significant expenses besides normal household expenses?  Yes  No

*Normal household expenses include average expenses for food, utilities, fuel, transportation, entertainment, clothing, and healthcare. If you have significant expenses (greater than \$400 per month) outside of these categories, answer "Yes."*

### ➔ Call and give this information to one of our Loan Specialists

Toll Free (866) 545-9070

Call us today. We have many options that may help you and give you peace of mind.