

Markve and Zweifel, PLLC

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PRE-CONSULTATION QUESTIONNAIRE

Email completed questionnaire to shortsaledocs@mzlaw.us or fax to 763-447-6458 prior to consultation

1. Name(s): _____
Date: _____ Last four digits of social security #(s): _____
Phone(s): _____ Email(s): _____
2. Marital Status: _____ (ex: single, married, divorced, separated, widowed)
3. If divorced, did divorce occur during ownership of this property? _____
4. If divorced, will both spouses be willing to participate? _____
5. Short Sale Property Address: _____

6. Mailing Address: _____
7. Who referred you to Markve and Zweifel? _____
8. Why are you selling the property? _____
9. Have you had any job loss or income loss since acquiring this mortgage? _____
If yes, explain: _____
10. Current employment status: full time part time self-employed unemployed
11. Other income sources? _____
12. Are you in default on any of your mortgages? _____
If yes, when was your last payment? Month _____ Year _____

13. Approximately how much cash do you have in checking and/or savings? _____
14. Approximate balance totals of any retirement accounts: _____
15. Have you filed bankruptcy? _____ If yes, when was it discharged? _____
Were the mortgage(s) reaffirmed? _____
16. Current mortgage holder(s) and approximate balance(s):
- 1st mortgage lender _____ Balance _____
- 2nd mortgage lender _____ Balance _____
- 3rd mortgage lender _____ Balance _____
17. Is your first mortgage Conventional, FHA, or VA? _____
18. If your mortgage is conventional, please call your lender and ask who the investor is and answer the following:
The investor on my loan is _____ Fannie Mae _____ Freddie Mac _____ Other
19. What bank(s) are your checking/savings accounts at? _____
20. If you ever refinanced for more than original mortgage amount, or obtained 2nd and/or 3rd mortgages, what were the funds used for? _____
21. Who is listed on the mortgage and note? _____
22. Who is in title on the property? _____
23. Have you received a "Notice of Foreclosure?" _____
24. Has a sheriff sale occurred or been scheduled? _____ If so, when? _____
25. Do you occupy the property? _____ If not, when did you vacate? _____
If not, why did you vacate the property? _____
26. Are there tenants currently living in the property? _____
27. Is your property part of a Homeowner's Association? _____
HOA monthly dues amount? _____ Last month dues paid? _____
28. Please "check" if you have any of the following:
_____ federal or state tax liens _____ judgments _____ unpaid water bills

29. Do you have any collection activity from any other creditors at this time? _____

If yes, what kind of action are the creditors taking? _____

30. Briefly explain your reasons for selling the property and any financial hardship incurred by you since acquiring this mortgage. (ie: job loss, income loss, divorce, job transfer, death of wage earner, medical issues, increased monthly expenses, etc.)

31. Please check all hardships that apply, and the date in which they happened.

Job Loss _____ Income decrease _____ Disability _____ Death of Spouse _____
Divorce _____ Relocation _____ Retirement _____ Excessive Debt _____
Change in Family size _____ Re-marriage _____ Loss of Value NOT a hardship _____

32. List the two most important goals/objectives that you would seek to accomplish by selling your property via short sale.

1. _____

2. _____