

## General Customer / Realtor Information Worksheet

Please provide the information below for the customer/account requesting a short sale:

Name: \_\_\_\_\_

Account #: \_\_\_\_\_

Address of mortgaged property: \_\_\_\_\_

\_\_\_\_\_

Current address: \_\_\_\_\_

\_\_\_\_\_

Home phone: \_\_\_\_\_

Work phone: \_\_\_\_\_

Current employer: \_\_\_\_\_

Employer address: \_\_\_\_\_

\_\_\_\_\_

Tenure with employer: \_\_\_\_\_

Is the property to be short sold owner-occupied (circle one):  Yes  No

Realtor name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Work phone: \_\_\_\_\_

Cell phone: \_\_\_\_\_

**Customer Financial Worksheet (Page 1 of 3)**

All information **must be completed** for your Short Sale Application to be considered.

Name: \_\_\_\_\_ Account #: \_\_\_\_\_

**How were the Mortgage Loan Proceeds used?**

<u>Uses</u>	<u>Amount</u>	
To purchase this property:	\$ _____	
Payoff other Debt:		
Credit Cards:	\$ _____	
Mortgages:	\$ _____	
Vehicle (e.g., car, boat):	\$ _____	
Living Expenses:	\$ _____	
Make Payments on 1 <sup>st</sup> Mortgage:	\$ _____	
Home Repairs:	\$ _____	
Repairs on other real estate:	\$ _____	Address: _____
Home Upgrades:	\$ _____	_____
Upgrades on other real estate:	\$ _____	Address: _____
		_____
Purchase other real estate:	\$ _____	Address: _____
		_____
Down payment on other real estate:	\$ _____	Address: _____
		_____
Purchase other assets (e.g., car, boat, RV):		
	\$ _____	Type: _____
	\$ _____	Type: _____
	\$ _____	Type: _____

**Customer Financial Worksheet (Page 2 of 3)**

All information **must be completed** for your Short Sale Application to be considered.

Name: \_\_\_\_\_ Account #: \_\_\_\_\_

**Other Real Estate Owned:**

1. Address: \_\_\_\_\_  
\_\_\_\_\_

1<sup>st</sup> Mortgage: Lender: \_\_\_\_\_ Balance: \$ \_\_\_\_\_

2<sup>nd</sup> Mortgage: Lender: \_\_\_\_\_ Balance: \$ \_\_\_\_\_

2. Address: \_\_\_\_\_  
\_\_\_\_\_

1<sup>st</sup> Mortgage: Lender: \_\_\_\_\_ Balance: \$ \_\_\_\_\_

2<sup>nd</sup> Mortgage: Lender: \_\_\_\_\_ Balance: \$ \_\_\_\_\_

3. Address: \_\_\_\_\_  
\_\_\_\_\_

1<sup>st</sup> Mortgage: Lender: \_\_\_\_\_ Balance: \$ \_\_\_\_\_

2<sup>nd</sup> Mortgage: Lender: \_\_\_\_\_ Balance: \$ \_\_\_\_\_

**Other Assets (All assets must be disclosed): Statements for all asset accounts MUST be included.**

Automobile/Truck/Motorcycle: Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Amount Owed: \$ \_\_\_\_\_ Lien Holder: \_\_\_\_\_

Automobile/Truck/Motorcycle: Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Amount Owed: \$ \_\_\_\_\_ Lien Holder: \_\_\_\_\_

Automobile/Truck/Motorcycle: Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_  
Amount Owed: \$ \_\_\_\_\_ Lien Holder: \_\_\_\_\_

Retirement Account: Type: \_\_\_\_\_ Value: \_\_\_\_\_

Investment Account: Type: \_\_\_\_\_ Value: \_\_\_\_\_

Bank Account: Type: \_\_\_\_\_ Value: \_\_\_\_\_

Bank Account: Type: \_\_\_\_\_ Value: \_\_\_\_\_

Savings Account: Type: \_\_\_\_\_ Value: \_\_\_\_\_

Other: Description: \_\_\_\_\_ Value: \_\_\_\_\_

All assets should be listed. Additional assets not included above may be listed on a separate sheet.

## Customer Financial Worksheet (Page 3 of 3)

All information **must be completed** for your Short Sale Application to be considered.

Name: \_\_\_\_\_ Account #: \_\_\_\_\_

### Monthly Income:

Source Name: \_\_\_\_\_ Monthly Gross/Net: \$ \_\_\_\_\_ / \_\_\_\_\_

Source Name: \_\_\_\_\_ Monthly Gross/Net: \$ \_\_\_\_\_ / \_\_\_\_\_

Source Name: \_\_\_\_\_ Monthly Gross/Net: \$ \_\_\_\_\_ / \_\_\_\_\_

Source Name: \_\_\_\_\_ Monthly Gross/Net: \$ \_\_\_\_\_ / \_\_\_\_\_

### Monthly Expenses:

Transportation (gas, maintenance, insurance, etc.): \$ \_\_\_\_\_

Household (food, maintenance, taxes, insurance etc.):  
\$ \_\_\_\_\_

Utilities: \$ \_\_\_\_\_

HOA: \$ \_\_\_\_\_

Medical: \$ \_\_\_\_\_

Insurance: \$ \_\_\_\_\_

Automobiles/Other: \$ \_\_\_\_\_

Credit Cards: \$ \_\_\_\_\_

Are there any other changes to your financial situation since loan origination that we should be aware of that are not already incorporated into your hardship letter? Please explain fully.

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green tree

1<sup>st</sup> Mortgage Information Worksheet

Name of first mortgage holder: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Name of Account Holder: \_\_\_\_\_

Account Number: \_\_\_\_\_

Payment Due: \_\_\_\_\_

Foreclosure date if applicable: \_\_\_\_\_

Payoff amount \$ \_\_\_\_\_

Please indicate if accepting (circle one):    Settlement    Short Sale

Amount of settlement / short sale (if applicable): \$ \_\_\_\_\_

Authorization for First Mortgage Holder to Release Information and Authorization for Green Tree Servicing LLC to Obtain an Updated Credit Report

I (We), \_\_\_\_\_ hereby gives \_\_\_\_\_ authorization to release any and all information concerning the above-referenced account to Green Tree Servicing LLC ("Green Tree"). I (We) also give authorization for Green Tree to obtain an updated credit report.

Dated this the \_\_\_\_ day of \_\_\_\_\_ 200\_\_

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Co-Borrower