

# WMG Associates

## Information for Loan Modification Pre-Approval

Case # \_\_\_\_\_ Date \_\_\_\_\_ Agent \_\_\_\_\_

### General Information

- 1) Owners Name: \_\_\_\_\_ 1a) Co-Owners Name: \_\_\_\_\_  
2) Property Address: \_\_\_\_\_  
3) Main Phone # \_\_\_\_\_ 3a) Secondary Phone # \_\_\_\_\_  
3b) Cell \_\_\_\_\_ 3c) Fax \_\_\_\_\_ 3d) Email \_\_\_\_\_  
4) What year did they acquire the property? \_\_\_\_\_ 5) Estimated Home Value \$ \_\_\_\_\_  
6) Do they own any other Real Estate? Yes No

### Loan Information – 1<sup>st</sup> Loan

- 7) Mortgage Company: \_\_\_\_\_ 8) Loan # \_\_\_\_\_  
9) Is the client behind on this loan? Yes No If yes, how many months? \_\_\_\_\_  
10) Type of Loan: \_\_\_\_\_ 11) Current Loan Amount \$ \_\_\_\_\_ 12) Current Rate % \_\_\_\_\_  
13) Current Monthly Payment \$ \_\_\_\_\_ 14) If Adjustable, when will it adjust? \_\_\_\_\_  
15) If it has already Adjusted, what was the *original* Rate & Payment? Rate % \_\_\_\_\_ Payment \$ \_\_\_\_\_  
16) Are Impounds, Taxes & Insurance currently included? Yes No  
17) If NO, What are their current Taxes & Insurance? \$ \_\_\_\_\_ Annually Monthly

### Loan Information – 2<sup>nd</sup> Loan

- 18) Is there a 2<sup>nd</sup> Loan? Yes No 19) If so, are they expecting that Loan to be Modified as well? Yes No  
20) Mortgage Company: \_\_\_\_\_ 21) Loan # \_\_\_\_\_  
22) Is the client behind on this loan? Yes No If yes, how many months? \_\_\_\_\_  
23) Type of Loan: \_\_\_\_\_ 24) Current Loan Amount \$ \_\_\_\_\_ 25) Current Rate % \_\_\_\_\_  
26) Current Monthly Payment \$ \_\_\_\_\_ 27) If Adjustable, when will it adjust? \_\_\_\_\_

### Additional Information

- 28) **FEE QUOTED \$** \_\_\_\_\_  
29) Has the Client been in a Loan Mod before? Yes No If so, when? \_\_\_\_\_  
30) Why can't client afford current payment? \_\_\_\_\_  
30a) What's their Hardship? \_\_\_\_\_  
31) What's their Goals? \_\_\_\_\_  
32) Describe borrower's income situation, and provide any additional notes:  
\_\_\_\_\_  
33) What payment can they afford? \_\_\_\_\_  
34) In Bankruptcy? \_\_\_\_\_ If yes when discharged? \_\_\_\_\_  
35) Appointment time for call back for approval \_\_\_\_\_