# Mortgage Note Submission Worksheet

**CCFC/Broker Information**

Name _____ Date _____
Company _____
Address _____
City _____ State _____ ZIP _____
Phone _____ Fax _____

**Real Estate Information**

Street address _____ County _____
City _____ State _____ ZIP _____
Current estimated value $ _____ Based on _____

*Residential* ☐ Single-family ☐ Multi-family
☐ Owner-occupied ☐ Rental
*Commercial* Description _____
☐ Owner-occupied ☐ Rental
*Vacant land* Description _____

**Description of Real Estate Property & Area** _____
_____

**Historical Information**

Date of sale _____
Selling price $ _____
Down payment $ _____
First lien $ _____
Second lien $ _____

**Prior Mortgage Information** (if any)

_____
_____
_____
_____
_____

**Note Information**

Date of note _____
Amount $ _____
Term in months _____ (a) _____ (b)
Payment amount $ _____
Balloon amount $ _____
Balloon date _____
Interest rate _____ %
Due date 1st pmt _____
# of pmts paid _____
# of pmts left _____
Next pmt due _____
Balance $ _____

**Payor Information**

(Employment info, payment history, SSN) _____
_____
_____
_____

**Seller's Motivation/Need**

_____
_____
_____
_____

**Quote**

Buy Total Note $ _____
Buy _____ pmts for $ _____
Buy _____ pmts for $ _____
Date of quote _____
Closing costs paid by _____

*I have copies of the following:*

| | | |
|---|---|---|
| Note | ☐ Yes | ☐ No |
| Security instrument | ☐ Yes | ☐ No |
| Title | ☐ Yes | ☐ No |
| Sales contract | ☐ Yes | ☐ No |
| Payor credit report | ☐ Yes | ☐ No |
| Closing statement | ☐ Yes | ☐ No |
| Bill of sale | ☐ Yes | ☐ No |
| Insurance | ☐ Yes | ☐ No |
| Prior mortgage info | ☐ Yes | ☐ No |
| Payment history | ☐ Yes | ☐ No |

/mortgage