



FREE LOAN EVALUATION FORM

PLEASE FAX COMPLETED FORM TO: (619) 512-4500

This Free Loan Evaluation Form will allow us to determine if your financial profile fits within the eligibility requirements for a successful loan modification or FHA short refinance.
You will receive an approval within 24 – 48 hours after completing this Free Loan Evaluation Form.

HOMEOWNER INFORMATION (page 1 of 5)

Homeowner Name(s) _____

Borrower 1) _____

Borrower 2) _____

Home Phone _____ Cell Phone _____

Email Address 1) _____

Email Address 2) _____

Home Address _____

City _____ State, Zip _____

SSN (Borrower 1) _____ SSN (Borrower 2) _____

Has homeowner given authorization to check credit? _____

Number of dependants _____ Ages _____

How many properties would you like evaluated for Mortgage Relief? _____

How did you hear about Mortgage Relief Services? _____

What is the name of your Mortgage Relief Representative? _____

Have you attempted to modify your mortgage(s) before? _____

If so what was the result? _____

LOAN INFORMATION (page 2 of 5)

Please print and fill out a separate LOAN INFORMATION page for each property you would like evaluated.
Please fax along a copy of the mortgage statement for each loan you would like evaluated (if possible).

Property Address _____

City _____ **State, Zip** _____

Property type (Primary, 2nd Home, Investment) _____ (SFR, condo) _____

What year did you buy this property? _____ What was the purchase price? _____

What is the current value? _____ How long have been in your current loan(s) _____

1st/Primary Loan	2nd Loan/HELOC
Lender (Countrywide, Indymac, Wamu, BofA, etc) _____	Do you have a second loan or Home Equity Line of
Loan Amount _____	Credit on this property? _____
Interest Rate _____	Lender (Countrywide, Indymac, Wamu, BofA, etc) _____
Loan Number _____	Loan Amount _____
What type of loan do you have (5 year, 7 year, 30 year etc?) _____	Interest Rate _____
Mortgage Payment \$ _____	Loan Number _____
Are your taxes and Insurance included in your payment? _____	Loan Type (Adjustable or Fixed Rate) _____
Monthly taxes and insurance \$ _____	Mortgage Payment \$ _____
Adjust Date (if you have an adjustable when will it adjust)? _____	Have you been late on this mortgage? _____
Have you been late on your mortgage? _____	If so, how many times? _____
If so, how many times? _____	And when was the last time you made your mortgage payment (month)? _____
And when was the last time you made your mortgage payment (month)? _____	

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FINANCIAL INFORMATION (page 3 of 5)

Income	Monthly Expenses	Assets
Monthly NET income Applicant #1 _____	1st/Primary Loan payment _____	Checking: _____ Savings: _____
Employer _____	2nd Loan/HELOC payment: _____	IRA: _____
Position _____	Property Taxes: _____	401K: _____
Length of employment _____ _____	Medical Insurance: _____	Stocks/Bonds: _____
Monthly NET income Applicant #2 _____	Car Payment: _____	Real Estate
Employer _____	Car Insurance: _____	
Position _____	Car Maintenance _____	Total Properties Owned _____
Length of employment _____ _____	Gasoline _____	Primary Residence
Monthly bonus/commission _____	Personal/student loans: _____	Address _____ _____
Rental property income _____	Credit Card Balances: _____	Value _____
Additional misc income: (rented room, side job, etc) _____	What are your monthly minimum credit card payments? _____	Loan Balance _____
Other: _____	Child Care: _____	Additional Properties
	Alimony: _____	
	Tuition: _____	Address _____ _____
	Food: _____	Value _____
	Utilities (total): _____	Loan Balance _____
	Home Phone bill: _____	Additional Properties
	Cell Phone bill: _____	
	Cable: _____	Address _____ _____
		Value _____
		Loan Balance _____

ADDITIONAL NOTES (page 5 of 5)

YOU WILL RECEIVE AN APPROVAL WITHIN 24 – 48 HOURS

After completing and faxing back your completed Free Loan Evaluation Form, you will receive an approval within 24 – 48 hours.

Once your file has been approved we will need you to begin gathering the following items:

The speed in which we gather these items will directly affect the speed of the loan modification. Currently loan modifications are taking between 60 – 120 days. By gathering these items ahead of time, we can dramatically increase the speed of the loan modification process. Please call us if you have a problem locating any of these items.

- Mortgage statements on all properties
- 2 months of bank statements (if w-2)
- 6 months of bank statements (if self employed)
- Current pay stub
- Profit and Loss statement (if self employed)
- Tax returns for the last 2 years
- W-2's for the last 2 years (if w-2)
- Home insurance declaration pages all properties owned
- Property tax bills
- Rental agreement for investment properties