

Aspen Properties Group, LLC - Financial Intake Form

Borrower:

Name: _____
First M.I. Last

Social Security # _____ Date of Birth _____

Address: _____
Street Address City State Zip

Home Phone: _____ Cell Phone: _____

Employer: _____ Annual Income: Gross \$ _____

Other Income *? Please identify source and amount _____

(*Alimony, child support, or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered for repaying this loan.)

Work Phone: _____ Email Address: _____

Marital Status: Married Separated Unmarried (single, divorced, widowed)

of People in Household? _____

Co – Borrower:

Name: _____
First M.I. Last

Social Security # _____ Date of Birth _____

Address: _____
Street Address City State Zip

Home Phone: _____ Cell Phone: _____

Employer: _____ Annual Income: Gross \$ _____

Other Income *? Please identify source and amount _____

(*Alimony, child support, or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered for repaying this loan.)

Work Phone: _____ Email Address: _____

Marital Status: Married Separated Unmarried (single, divorced, widowed)

of People in Household? _____

Do You Want to Keep Your Home? _____ Are you currently living in the home? _____

Current Mortgage Company (1st Lien Holder):
Name of Company? _____

Have You Contacted Your Lender/Service? Yes No If Yes, Last Contact Date: _____

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1st Mtg Loan Information:

1st Loan Number: _____ Current Value of Your Home: _____
 Type of Mortgage: ___ FHA ___ VA ___ Conv. ___ ARM ___ 30 -Yr Fixed ___
 Other Identify: _____
 Monthly Mortgage Payment: _____ Term: _____ Interest Rate: _____
 Date Last Mortgage Payment Made: _____ How Many Months Past Due Are You? _____
 Have You Been Served Legal Papers? _____
 Is your house currently in foreclosure? _____
 Ever Had a Loan Modification / Forbearance Agreement? _____ When? _____
 Have You Filed Bankruptcy? _____ When? _____
 Have You Ever Worked with Another Agency to Remedy Your Mortgage Default? _____
 If Yes, Agency's Name: _____ Counselor: _____ Payments to Agency (if any): \$ _____

Income and Asset Sources

Monthly Income: Borrower:		Monthly Income: Co-Borrower	
Wages (before taxes)	\$	Wages (before taxes)	\$
Unemployment Income	\$	Unemployment Income	\$
Child Support/Alimony*	\$	Child Support/Alimony*	\$
SSI/SSDI	\$	SSI/SSDI	\$
Retirement/Pension	\$	Retirement/Pension	\$
Rents received	\$	Rents received	\$
Other	\$	Other	\$
Gross Monthly Income:	\$	Gross Monthly :	\$
Net Monthly Income**:	\$	Net Monthly Income**:	\$

(*Alimony, child support, or separate maintenance income need not be revealed if the Borrower or Co-Borrower does not choose to have it considered for repaying this loan.)

(** Gross Income, less Federal/State/Local Taxes, FICA, 401K deductions)

Besides income sources, please circle additional resources available to pay towards defaulted mortgage: 401(K), 403(b), CDs IRA's, Money Market Funds, Family/Friends, Other?

Amount Available: \$ _____

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Income and Asset Sources

	Monthly	Annual	Total Owed
Total Monthly Payment			
1 st Mortgage (Principal & Int., Property Taxes, H/O Insurances, H/O Assn Dues)	\$	\$	\$
If not escrowed, Property Taxes	\$	\$	\$
If not escrowed, H/O Insurance	\$	\$	\$
If not escrowed, Homeowner Associations Dues	\$	\$	\$
Auto Expenses (gas, maintenance, etc.)	\$	\$	\$
Auto Insurance	\$	\$	\$
Credit Cards	\$	\$	\$
Child Care, Alimony, Child Support	\$	\$	\$
Food (Groceries, Eating Out, Snacks)	\$	\$	\$
Utilities (gas, electric, water, sewer, and garbage)	\$	\$	\$
Communications (cell phone, telephone, internet)	\$	\$	\$
Miscellaneous Spending Money	\$	\$	\$
Auto Loans: Year Make & Model	\$	\$	\$
Auto Loans: Year Make & Model	\$	\$	\$
Installment Loans	\$	\$	\$
Medical Expenses	\$	\$	\$
Student Loans	\$	\$	\$
Home Equity Loans, outstanding balances	\$	\$	\$
TOTAL MONTHLY EXPENSES	\$	\$	\$
MONTHLY SURPLUS/SHORTFALL	\$	\$	\$

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1. I/we represent that I am/we are currently occupying the property securing the loan as my/our primary residence. If I am /we are currently occupying the property, I/we also represent that I/we intend to continue occupying the property as my/our primary residence.
2. Under penalty of perjury, I/we certify that all documents and information that I/we provide to the Housing Counselor and the Lender/Servicer, including the documents and information regarding my eligibility for any modification or eligibility for any Foreclosure Mediation Program, are true and correct and accurately reflect my financial status. My Lender/Servicer may discuss, obtain and share information about my mortgage and financial situation with third parties regarding a possible alternative to foreclosure.
3. I/we understand and acknowledge the Lender/Servicer may investigate the accuracy of my/our statements, may require me/us to provide supporting documentation, and that knowingly submitting false information may violate state and Federal law.
4. I/we understand that if I/we have intentionally engaged in fraud or misrepresented any fact(s), or if I/we do not provide all of the required documentation, the Lender/Servicer may refuse to consider any modification or alternative to foreclosure.
5. I/we certify that I am /we are willing to provide all requested documents and to respond to Housing Counselor/Mediator/Lender/Servicer communications in a timely manner. I/we understand that time is of the essence and intentional delays on my/our part could result in making me/us ineligible for the Foreclosure Mediation Program.
6. I/we understand that negotiations for a possible foreclosure alternative will not constitute a waiver or defense to my Lender's/Servicer's right to commence or continue any foreclosure or other collection action.
7. I/we understand that an alternative to foreclosure will only be provided if an agreement has been approved in writing by my Lender/Servicer.

Borrower _____ Date _____

Co-Borrower _____ Date _____

Aspen Properties Group, LLC

BORROWER'S AUTHORIZATION FORM

1st Mtg Lender:

Lender's Name: _____

Lender's Address: _____

Phone Number: _____

Loan Number: (1st mtg Lender) _____

Borrower: _____

Co-Borrower: _____

Property Address: _____

This letter gives the above Lender permission to discuss my loan and release information

to : Aspen Properties Group, LLC or Assignees
1221 W 103rd St #108
Kansas City, MO 64114
800-326-5799
F 443-371-9893

Please provide the requested information, which information may include but not limited to: a loan payoff, account history, interest rate, due date, amount of monthly payment and/or past due information, workout status & reinstatement amount.

A copy of this authorization may be accepted as an original.

Borrower

Co-Borrower

Social Security No. _____

Social Security No. _____

Date _____

Date _____