

## **Mortgage Note Worksheet**

**This worksheet involves a private note collateralized by a (select all that pertain)**

- single family residence       multi-family residence       rental property  
 commercial building       business note (sale of business)       acreage (raw land)

**Description of property, business or area** \_\_\_\_\_

**Address of Real Estate of Business** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_

### ***Historical Information***

Date of Sale \_\_\_\_\_ Sales Price \$ \_\_\_\_\_ Down Payment \$ \_\_\_\_\_

This note is secured by a     1st Mortgage       2nd Mortgage       Other

Date of Note (inception) \_\_\_\_\_ Face Amount \$ \_\_\_\_\_ Term (in months) \_\_\_\_\_

Monthly Payment \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_  Fixed       Adjustable

Balloon information, amount & date (if applicable) \_\_\_\_\_

Date of 1st Payment \_\_\_\_\_ Number of Payments Made \_\_\_\_\_ Number of Payments Left \_\_\_\_\_

Due Date of Next Payment \_\_\_\_\_ Balance Due On Note \$ \_\_\_\_\_ Maturity Date \_\_\_\_\_

### ***Payor's Information***

Name of Payor \_\_\_\_\_ S.S. Number \_\_\_\_\_ - \_\_\_\_\_

Name of Seller \_\_\_\_\_ Phone \_\_\_\_\_

Cellular Phone \_\_\_\_\_ Fax \_\_\_\_\_

Motivation for Sale \_\_\_\_\_

### ***Requested Quote***

- Buy Complete note       Buy \_\_\_\_\_ % of Note       Buy Balloon Only  
 Buy \_\_\_\_\_ (number) of payments       Seller requires \$ \_\_\_\_\_ lump sum cash.

*Complete the form and return via fax to our offices. You will receive a call from one of our underwriters within 24 hours of submission.*