



# BARLAY LAW GROUP LLC

ESTATE PLANNING | REAL ESTATE | BUSINESS

GUIDING CLIENTS IN PROTECTING THEIR MOST IMPORTANT ASSETS: FAMILY, PROPERTY & BUSINESS

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## ShortPASS – Intake Worksheet

### Home Owner Information:

Home Owner Name(s): \_\_\_\_\_

Property Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number(s): \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Agents Name(s): \_\_\_\_\_

### Questions:

1. Who is your mortgage company/lender? \_\_\_\_\_
2. What kind of loan do you have? (FHA, VA, Conventional, Home Equity) \_\_\_\_\_
3. Is there more than one mortgage lien on your property? (2nd Lien, 3rd Lien, Etc.) If so, who are the lenders on the other liens? \_\_\_\_\_  
\_\_\_\_\_
4. How many months behind on payments are you? \_\_\_\_\_
5. How much do you currently owe? (Can be found from their latest mortgage statements - the principle balance of the loan(s)). \_\_\_\_\_
6. Have you taken out a home equity loan? If so, when? \_\_\_\_\_
7. What is the primary reason for default (Unemployment, Excessive Credit, Divorce, Death, Illness, Loss of Tenant, Relocation, etc...)? \_\_\_\_\_



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8. Are you currently in Bankruptcy? If not, when (if at all) last did you file for Bankruptcy?

\_\_\_\_\_

9. Are you currently in Foreclosure? What correspondence have you received from your lender? Certified Letters? Notice of Default? Notice of Acceleration? Notice of Foreclosure Proceedings? When was the last correspondence received? \_\_\_\_\_

\_\_\_\_\_

10. Describe your home for me? \_\_\_\_\_

\_\_\_\_\_

11. What is the condition of the property? \_\_\_\_\_

\_\_\_\_\_

12. Are you currently living in the property? If no, where are you currently living? Are the utilities still on at the property? \_\_\_\_\_

\_\_\_\_\_

13. Are you current on your utilities? What about Homeowner Association (HOA) dues? If not current, how much is owed? \_\_\_\_\_

\_\_\_\_\_

14. If the situation is related to a divorce or separation, has the other spouse moved out? Will the other spouse be cooperative in signing paperwork? \_\_\_\_\_

\_\_\_\_\_

15. Are there any outstanding judgments and/or liens that you are aware of? \_\_\_\_\_

\_\_\_\_\_

16. Have you reviewed the pre-foreclosure options available (deed-in-lieu, loan modification)? \_\_\_\_\_

\_\_\_\_\_