

Quote Submission Worksheet

Note Seller Interview Worksheet

Many of our brokers like to use this form when speaking to note sellers as a reminder of the info that should be requested from a note seller who is requesting a quote.

Home Information

Property Address: _____

City: _____ State: _____ Zip Code: _____

Property Value: _____

Any Other Liens on Property: _____

Is Property Owner Occupied: _____

Is Land Included: _____

Land Plot Size: _____

Additional Home Details

Sale Information

Date of Sale: _____

Sales Price: _____

Down Payment: _____

Did You Use an Attorney or Title Company to Close: _____

Do You have Title Policy: _____

Note Information

Original Note Amount: _____

Position of Note: _____

Note Balance: _____

Interest Rate: _____

Payment Amount: _____

Escrow Amount: _____

Date of 1st Payment: _____

Payment Frequency: _____

Original Length: _____

No. of Payments Made: _____

No. of Payments Remaining: _____

Next Payment Due Date: _____

Are the Payments on Time: _____

Balloon Amount: _____

Balloon Due Date: _____

Borrower Information

Borrower Type: Private Individual(s)

Borrower Name(s): _____

Did You Pull a Credit Report at Sale: _____