

# Private Owner Script & Intake Form

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Owner Information: \_\_\_\_\_ Lead Source: \_\_\_\_\_

Note Owners Name: \_\_\_\_\_ Date: \_\_\_\_\_

Phone #: \_\_\_\_\_ Cell #: \_\_\_\_\_ E-mail: \_\_\_\_\_

Note Information: (Ask, "What can you tell me about the note?")

Asking Price: \_\_\_\_\_ Original Value: \_\_\_\_\_ Date Written: \_\_\_\_\_

UPB: \_\_\_\_\_ Back Interest: \_\_\_\_\_ Late Charges & Fees Due: \_\_\_\_\_

Balloon? When is it due? \_\_\_\_\_ Lien Position: \_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_

Servicer: \_\_\_\_\_ Rate & Terms: \_\_\_\_\_

Note Type – amortized/simple interest/interest only? \_\_\_\_\_ Mo Payment - PI: \_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

Seller Motivation: \_\_\_\_\_

Property Information:

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Estimated Value? \_\_\_\_\_ Based on? \_\_\_\_\_

Property Style: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

# Beds: \_\_\_\_\_ # Baths: \_\_\_\_\_ Garage: # of Cars \_\_\_\_\_ Attached, Detached

Rooms: Fam, Rec, Den, Office, Dine, Loft, Sun, OutBldg: Shed, Barn, Dog Pen

Heating: FAG, FAE, WoodStv, FirePlc, Solar, Elec Baseboard, \_\_\_\_\_

A/C: None, Central, Windows,

Hot Water: Installation Date \_\_\_\_\_ Tank, On Demand, NGas, Electric

Basement Type: None, Crawl, Partial, WlkOut, Full Finishing: Unf, Partial, Full

Main SF \_\_\_\_\_ Bsmt SF \_\_\_\_\_ Other SF \_\_\_\_\_ Total SF \_\_\_\_\_ Lot Size \_\_\_\_\_

Property Taxes: \$ \_\_\_\_\_ Year Blt: \_\_\_\_\_ Year Remodeled: \_\_\_\_\_

Property Condition: \_\_\_\_\_