

Your Name:

Your Case Number:

## HOME LOAN/MODIFICATION/REFINANCE WORKSHEET

In order to approve a new loan or modify, restructure or refinance a current home loan, we need information about the loan terms, as well as the debtor(s) current financial status. This worksheet must be completed and returned along with an updated budget - which must include the monthly Chapter 13 plan payment and the new loan payment being applied for if it is being paid outside the plan.

Purpose of Loan:

Loan Specifics

Amount:

Interest Rate (Fixed or Variable):

Repayment amount and frequency:

Are real estate taxes included in monthly payment?

Is property insurance included in monthly payment?

Length of loan (number of years):

Lender Information

Name of lender:

Contact person:

Phone number:

Fax number:

E-mail address:

Copy of Offer to Purchase (if available)

Scheduled Closing Date

How will loan funds be applied? **(Please check all that apply)**

\_\_\_\_\_ Payoff of Chapter 13

\_\_\_\_\_ Mortgage arrears paid direct at loan closing

\_\_\_\_\_ Taxes paid direct at loan closing

\_\_\_\_\_ Other: