

## Portfolio Submission Worksheet

### CCFC/Referral Representative Information

Name \_\_\_\_\_ Date \_\_\_\_\_  
Company \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_

### Client Information

Contact \_\_\_\_\_  
Company \_\_\_\_\_

### Portfolio Information

Type of portfolio (description of collateral if any): \_\_\_\_\_  
\_\_\_\_\_

### Portfolio Summary

Item	Monthly
Total Loans in Package	
Average Payment	
Average Payments Remaining	
Average Loan Term	
Average Amt. Financed	
Average Balance	
Total Amt. of Payments	
Loans Principal Balance	
Loans Gross Balance	

Average age of collateral \_\_\_\_\_ Interest method \_\_\_\_\_  
Age range of collateral \_\_\_\_\_ Average loan % to value \_\_\_\_\_

### Seller's Motivation/Need

Price range desired  
% of principal balance \_\_\_\_\_  
% of gross balance \_\_\_\_\_