Private Mortgage Note Submission Worksheet

CCFC/Referral Representative Information

Name _____ Date _____
Company _____
Address _____
City _____ State _____ ZIP _____
Phone _____ Fax _____

Real Estate Information

Street address _____ County _____
City _____ State _____ ZIP _____
Current estimated value $ _____ Based on _____

Residential ☐ Single-family ☐ Multi-family
☐ Owner-occupied ☐ Rental
Commercial Description _____
☐ Owner-occupied ☐ Rental
Vacant land Description _____

Description of Real Estate Property & Area _____
_____

Historical Information

Date of sale _____
Selling price $ _____
Down payment $ _____
First lien $ _____
Second lien $ _____

Prior Mortgage Information (if any)

_____
_____
_____
_____
_____

Note Information

Date of note _____
Amount $ _____
Term in months _____ (a) _____ (b)
Payment amount $ _____
Balloon amount $ _____
Balloon date _____
Interest rate _____ %
Due date 1st pmt _____
# of pmts paid _____
# of pmts left _____
Next pmt due _____
Balance $ _____

Payor Information

(Employment info, payment history, SSN) _____
_____
_____
_____

Seller's Motivation/Need

_____
_____
_____
_____

Quote

Buy Total Note $ _____
Buy _____ pmts for $ _____
Buy _____ pmts for $ _____
Date of quote _____
Closing costs paid by _____

I have copies of the following:

Note	☐ Yes	☐ No
Security instrument	☐ Yes	☐ No
Title	☐ Yes	☐ No
Sales contract	☐ Yes	☐ No
Payor credit report	☐ Yes	☐ No
Closing statement	☐ Yes	☐ No
Bill of sale	☐ Yes	☐ No
Insurance	☐ Yes	☐ No
Prior mortgage info	☐ Yes	☐ No
Payment history	☐ Yes	☐ No