

## 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	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Security instrument	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Title	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Sales contract	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Payor credit report	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Closing statement	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Bill of sale	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Insurance	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Prior mortgage info	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Payment history	<input type="checkbox"/> Yes	<input type="checkbox"/> No