

Mortgage Note Worksheet

This worksheet involves a private note collateralized by a (select all that pertain)

- | | | |
|--|---|---|
| <input type="checkbox"/> single family residence | <input type="checkbox"/> multi-family residence | <input type="checkbox"/> rental property |
| <input type="checkbox"/> commercial building | <input type="checkbox"/> business note (sale of business) | <input type="checkbox"/> acreage (raw land) |

Description of property, business or area _____

Address of Real Estate of Business _____

City _____ **State** _____ **Zip** _____

Historical Information

Date of Sale _____ Sales Price \$ _____ Down Payment \$ _____

This note is secured by a ☐ 1st Mortgage ☐ 2nd Mortgage ☐ Other

Date of Note (inception) _____ Face Amount \$ _____ Term (in months) _____

Monthly Payment \$ _____ Interest Rate _____ ☐ Fixed ☐ Adjustable

Balloon information, amount & date (if applicable) _____

Date of 1st Payment _____ Number of Payments Made _____ Number of Payments Left _____

Due Date of Next Payment _____ Balance Due On Note \$ _____ Maturity Date _____

Payor's Information

Name of Payor _____ S.S. Number _____ - _____

Name of Seller _____ Phone _____

Cellular Phone _____ Fax _____

Motivation for Sale _____

Requested Quote

- | | | |
|---|---|---|
| <input type="checkbox"/> Buy Complete note | <input type="checkbox"/> Buy _____ % of Note | <input type="checkbox"/> Buy Balloon Only |
| <input type="checkbox"/> Buy _____ (number) of payments | <input type="checkbox"/> Seller requires \$ _____ | lump sum cash. |

Complete the form and return via fax to our offices. You will receive a call from one of our underwriters within 24 hours of submission.