

George Russo & Associates P.C.

Borrower Intake Form

1-A) Borrower: _____ Social Security No.: _____

Date of Birth: _____ Contact #: _____

Email: _____ Fax #: _____

1-B) Borrower: _____ Social Security No.: _____

Date of Birth: _____ Contact #: _____

Email: _____ Fax #: _____

2) Property Address: _____

Is the property a: Condo Family home Commercial property

3) Lender: _____ Loan No.: _____

Original loan amount: \$ _____ Interest rate: _____ % Adjustable Fixed

Current monthly payment: \$ _____

Are you behind on your mortgage payments: Yes No How many months _____

4) Have you been served with a summons and complaint: Yes No

5) I want to: Keep the property Sell the property Refinance

The property is my: Primary residence Second home Investment property

Do you occupy the property: Yes No

Have you received a modification in the past: Yes No

Have you ever filed for bankruptcy: Yes No Has it been discharged: Yes No

6) Do you have a second lien on the property: Yes No Type of lien: _____

If yes: Lender: _____ Loan No.: _____

Original loan amount: \$ _____ Interest rate: _____ % Adjustable Fixed

Current monthly payment: \$ _____

Are you behind on your mortgage payments: Yes No How many months _____

7) What is your reason of hardship (check all that applies):

Loss of household income Increased expenses

Divorce Military service Excessive debt payments

How did you hear about our services: _____