

**New Account Set-up Information
Borrowers Worksheet (Existing Accounts)**

BORROWER'S INFORMATION

Borrower 1: _____

Borrower SSN: _____

Cell #: _____ Work #: _____

Borrower DL#: _____

Email: _____

Borrower DOB: _____

Address: _____

Borrower 2: _____

Borrower SSN: _____

Cell #: _____ Work #: _____

Borrower DL#: _____

Email: _____

Borrower DOB: _____

NOTE INFORMATION

Finance Amount or Principal Balance for an existing Note: \$ _____ **Unpaid Interest:** \$ _____

Date of Last Payment: _____

Last Paid Due Date: _____

Interest Paid to Date: \$ _____

Balance of Funds in Escrow: \$ _____

Terms: _____ **Interest Rate:** _____ %

Grace Period for Payment: _____ Days

HOA: _____ **Other Fee:** \$ _____

Late Fee Amount: \$ _____

Monthly Payment P&I: \$ _____ **Monthly Escrow:** \$ _____

Insurance: \$ _____

Total Payment: \$ _____

Improved Property: _____

Unimproved Property: _____

Is this a RESPA Loan?

Is this a Balloon Payment? _____