



SECTION2: Financial Information Form

Loan Number: _____

Page 1 of 3

BORROWER INFORMATION

*Chase offers options for resolving your home loan issues. Please answer the questions below as completely and accurately as possible.
This information will only be used to aid in the evaluation of homeownership preservation options, not for any other purpose.*

Borrower		Co-Borrower	
Name (Include Jr. or Sr. if applicable)		Name (Include Jr. or Sr. if applicable)	
Social Security Number _____ - _____ - _____		Social Security Number _____ - _____ - _____	
Home Phone () Best Time to Call:		Home Phone () Best Time to Call:	
Work Phone () Best Time to Call:		Work Phone () Best Time to Call:	
Other Phone () Best Time to Call:		Other Phone () Best Time to Call:	
E-mail Address		E-mail Address	
Permission to Contact Via E-mail? <input type="checkbox"/> Yes <input type="checkbox"/> No		Permission to Contact Via E-mail? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Marital Status <input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced		Marital Status <input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced	

PROPERTY INFORMATION

Property Address (street, city, state & zip code)		Mailing Address (If different than Property Address)	
Reside at Property? <input type="checkbox"/> Borrower <input type="checkbox"/> Co-Borrower	Want to Retain Property? <input type="checkbox"/> Yes <input type="checkbox"/> No	# of People in Household	# of Dependents
# of Units at Property	Property Condition? <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor	Is the Property for sale? <input type="checkbox"/> Yes <input type="checkbox"/> No	Listing Amount: \$ _____
Realtor Name	Realtor Address	Realtor Phone ()	

LOAN INFORMATION

Loan Account Number	Months Past Due	Second Loan Account Number	Second Loan Months Past Due	Balance \$ _____
Are you currently working with Chase on a foreclosure prevention resolution? <input type="checkbox"/> Yes <input type="checkbox"/> No		Which foreclosure resolution is in process? <input type="checkbox"/> Refinance <input type="checkbox"/> Repayment Plan <input type="checkbox"/> Short Sale <input type="checkbox"/> Modification <input type="checkbox"/> Deferment <input type="checkbox"/> Deed-in-Lieu		
Chase Associate Name		Chase Associate Phone ()	Date Process Began	

BANKRUPTCY STATUS

If you are in an active bankruptcy, we will need to work with your attorney on a possible resolution.

Are you in an Active Bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No	Bankruptcy Chapter Type	Bankruptcy Case Number	Date of Bankruptcy Filing
Bankruptcy Associate Name	Bankruptcy Attorney Address		Bankruptcy Attorney Phone ()

EMPLOYMENT INFORMATION

Borrower			Co-Borrower		
Employer			Employer		
Employer Address			Employer Address		
Employer Phone ()	How long employed?	Self Employed? <input type="checkbox"/> Yes <input type="checkbox"/> No	Employer Phone ()	How long employed?	Self Employed? <input type="checkbox"/> Yes <input type="checkbox"/> No



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MONTHLY INCOME INFORMATION

Borrower		Co-Borrower	
Income Source (Employer Name, Rental, etc.)	Monthly Gross Income	Income Source (Employer Name, Rental, etc.)	Monthly Gross Income
Employer:	\$	Employer:	\$
Employer:	\$	Employer:	\$
Employer:	\$	Employer:	\$
Employer:	\$	Employer:	\$
Rental Income:	\$	Rental Income:	\$
Other:	\$	Other:	\$
Other:	\$	Other:	\$
Total	\$	Total	\$

Borrower / Co-Borrower	Additional Income Description <i>Alimony, child support, or separate maintenance income need not be revealed if Borrower or Co-Borrower does not choose to have it considered for approval of a loan workout.</i>	Monthly Amount
		\$
		\$
		\$
Total		\$

ASSETS

Asset	Amount Owed	Value	Vehicle	Model/Year	Amount Owed	Value
Home	\$	\$	Automobile		\$	\$
Other Real Estate	\$	\$	Automobile		\$	\$
Retirement Funds	\$	\$	Automobile		\$	\$
Investments	\$	\$	Motorcycle		\$	\$
Checking Balance	\$	\$	Boat		\$	\$
Savings Balance	\$	\$	Motor Home		\$	\$
Other:	\$	\$	Airplane		\$	\$
Other:	\$	\$	Other:		\$	\$
Other:	\$	\$	Other:		\$	\$
Total	\$	\$	Total		\$	\$



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MONTHLY EXPENSES		
Monthly Expense	Borrower	Co-Borrower
Other Home Loans, Rents & Liens	\$	\$
Auto Loan(s)	\$	\$
Auto Insurance & Other Auto Expenses	\$	\$
Credit Cards & Installment Loans	\$	\$
Health Insurance	\$	\$
Medical Expenses	\$	\$
Child Care, Child Support & Alimony	\$	\$
Food	\$	\$
Miscellaneous Spending Money	\$	\$
Utilities	\$	\$
Communications (Phone, Cell Phone, Internet)	\$	\$
Other	\$	\$
TOTAL	\$	\$

I agree that the financial information provided is true and accurate as of the date set forth opposite my signature and that any intentional or negligent misrepresentation of the information contained in this document may result in civil liability, including monetary damages, to any person who may suffer any loss due to reliance upon the document, and/or in criminal penalties including but not limited to fine or imprisonment or both under the provisions of Title 18 United States Code, Sec. 1001, et seq. I understand and acknowledge that any action taken by the lender is in strict reliance on the financial information provided. My signature/acceptance below grants the holder of my mortgage or its designee the authority to confirm the information that I have disclosed in this financial statement, to verify it as accurate by ordering a credit report, and to contact my realtor and/or credit counseling service.

By providing a wireless telephone number, you consent to receiving autodialed and pre-recorded message calls from the lender or its third-party debt collector at that number.

I represent that

I am

I am not

currently occupying the property securing the loan as my primary residence and that I intend to continue occupying the property as my primary residence.

Borrower Signature _____

Date _____

Co-Borrower Signature _____

Date _____