

Marketing Lead Form

Date: _____ 1st Call Back Date: _____ 2nd Call Back Date: _____

Borrowers: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Cell: _____ Work: _____

Email: _____

1st Mortgage Info – FHA/VA/CONV/ADJ – Other: _____

Lender: _____ Rate: _____ Term: _____ BK: 7/13 Discharge Date: _____

Payment: _____ Taxes: _____ Insurance: _____ HOA: _____

Balance: _____ Property Value: _____ Tax Repayment Plan: Y/N Loan Mod: Y/N 30-

day late payments past 12 months: Y/N Loan Mod: Y/N # of years: _____

Property Type: SFR – Townhome – Condo – MFG – Duplex – Other: _____

DO you own any other homes; Yes/No if so address: _____

2nd Info – Lender: _____ Payment: _____ Rate: _____ Balance: _____ Stripped in BK: Y/N

Personal Info-

Borrower: _____ Co- Borrower: _____

W2 Self-Emp 1099 Retired Military: Y/N

W2 Self-Emp 1099 Retired Military: Y/N

SSN: _____ DOB: _____

SSN: _____ DOB: _____

Employer: _____

Employer: _____

Years Worked: _____ FICO: _____

Years Worked: _____ FICO: _____

Income: _____

Income: _____

Borrower Goals: _____

Any other Debts or Notes: