



Your money. More value. Smart choice.

You can help by answering the questions below as Completely and accurately as possible. If you have a co-borrower, please fill in their information as well.

*This information will only be used to aid in the evaluation of homeownership preservation options, not for any other purpose.

Financial Hardship Assistance

You can type your answers right into this form and fax or mail it in.

1. Borrower One name: _____

Borrower Two name: _____

2. Please provide your current phone numbers.

() ()
Borrower One Home phone Borrower two Home Phone

() ()
Borrower one Work Phone Borrower two Work Phone

() ()
Borrower One Mobile Phone Borrower two Mobile Phone

3. Do you know your Patelco Account Number?

Yes, it's: _____ No

4. What is the address of your property?

Street Address _____

City _____ State _____ Zip _____

5. Are you or the co-borrower living in the property?

Yes No

6. How many people live at your address?

1 2 3 4 5 6 or more

7. How many of the people living at this address are dependents?

1 2 3 4 5 6 or more

8. Why are you having trouble with your home loan payments?

Select all that apply:

- Payment amount changed
- Loss of employment
- Death
- Illness
- Reduced income
- Other

Please explain:

9. Would you prefer to keep your home or sell it?

Keep my home Sell it

10. If you want to sell it, is it listed for sale?

Currently Listed Was listed previously
 Was never listed

11. Do you have any other loans on the home?

No Yes

12. If you have other loans on the home, approximately how much do you owe on all other loans combined?

\$ _____

13. Have you spoken with a debt counselor?

Yes No

14. How many cars do you own?

- 1 2 3 4 or more

15. Please enter how much you pay for the items Below and total them in the bottom row.

Monthly Expenses	Borrower	Co-Borrower
Other Home loans, Rent & Liens	\$	\$
Auto Loan(s)	\$	\$
Auto: Insurance & Other Expenses	\$	\$
Credit Cards & Installment Loans	\$	\$
Health Insurance	\$	\$
Medical Expense	\$	\$
Child Care, Child Support & Alimony	\$	\$
Food	\$	\$
Miscellaneous Spending Money	\$	\$
Utilities	\$	\$
Communications (phone, cell phone, internet)	\$	\$
Other:	\$	\$
TOTAL	\$	\$

16. Please enter your income details and total them in the last row.

Monthly Income	Borrower	Co-borrower
Net/ Take-Home pay	\$	\$
Other income	\$	\$
Other:	\$	\$
Other:	\$	\$
Total:	\$	\$

17. Please enter how much money you have in the assets below and total them in the last row.

Asset	Borrower	Co-borrower
Checking Account(s)	\$	\$
Savings	\$	\$
Money Market	\$	\$
Stocks, Bonds	\$	\$
CD's	\$	\$
Retirement Accounts	\$	\$
Other:	\$	\$
Other:	\$	\$
Total:	\$	\$

I (we) agree that the financial information provided is an accurate statement of my (our) financial status. I (we) understand and acknowledge that any action taken by the lender of my (our) home loan on my (our) behalf will be made in strict reliance on the financial information provided. My (our) signature(s) below grants the holder of my (our) home loan the authority to confirm the information I (we) have disclosed in this financial statement, to verify that its is accurate by ordering a credit report and to contact my (our) real estate agent and or credit counseling representative (if applicable). By signing below, I (we) advise you that if I (we) should hereafter reinstate my (our) home loan, or payoff my (our) home loan in full, then by doing so and without the necessity of any further action on my (our) part, I (we) hereby expressly withdraw this request for a loan workout. In that event, I (we) hereby direct you to take no further action to process this request for a workout.

X
Borrower

Date

X
Co-Borrower

Date

Don't Forget! Did you...

- Fully Complete all questions?
Remember: If you have a co-borrower, we need his or her information as well.
- Sign and date this form?
- Include Copies of your:
 - Bank account statement(s)
 - All pages of your most recent monthly statements (e.g. Checking, savings, money markets, CD).
 - If you don't have a checking account, submit copies of cash and money order receipts for all paid bills for the last month.
 - Savings account statement(s)
 - Income History:
 - If you are self-employed provided a profit and loss statement for the year to date
 - If you receive regular paychecks — copies of pay stub(s) for the month most recently worked for you and your co-borrower.
 - If you are not employed — provide proof of income (e.g. social security, disability, unemployment, rental, child support/ alimony and retirement).
 - Any death certificates or divorce decree(s)

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