

Name of Preparer \_\_\_\_\_

Property Address \_\_\_\_\_ Approximate ARV \_\_\_\_\_

**FOR NEW PROPERTIES**

Name of Seller \_\_\_\_\_ Social Security No. \_\_\_\_\_

Seller's Phone Number \_\_\_\_\_ Seller's Birthdate \_\_\_\_\_

Date of Acquisition \_\_\_\_\_ All documents complete and signed? Yes or No

Name of Trustee \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Name of Lender \_\_\_\_\_ Loan Number \_\_\_\_\_

Lender Phone No. \_\_\_\_\_ Approximate Loan Balance \_\_\_\_\_

Amount of Monthly Payment on Loan \$ \_\_\_\_\_ Need to Reinstate? Yes/No (Verify Amount)

Did we assume existing insurance? Yes or No Is Insurance Escrowed? Yes or No

Need new Insurance Yes or No Do we need to get refund? Yes or No

Does Mortgage Company Know of Transfer? Yes or No Assumable or Non-assumable?

Are Investor Notes and Deed of Trusts necessary? Yes or No Completed or released?

Name of Investor \_\_\_\_\_ Amount of Loan \_\_\_\_\_

Date of Loan \_\_\_\_\_ Normal Monthly Payment \_\_\_\_\_

First Payment Due \_\_\_\_\_ Amount of First Payment \_\_\_\_\_

**FOR NEW TENANTS**

Tenant Name \_\_\_\_\_ Term of Tenancy \_\_\_\_\_ to \_\_\_\_\_

Tenant Phone No.(s) Home \_\_\_\_\_ Work \_\_\_\_\_

Monthly Lease Payment \$ \_\_\_\_\_ Monthly Option Payment \$ \_\_\_\_\_ Total Monthly Payment \$ \_\_\_\_\_

Security Deposit/Option Down Payment \$ \_\_\_\_\_ Refundable or Non-refundable?

Prorated Amount if Any \_\_\_\_\_ Date Due \_\_\_\_\_

Repair Deductible Amount \$ \_\_\_\_\_ Late Fee Terms \_\_\_\_\_

Have Utilities been taken out of our name? Yes or No Date Service Terminated \_\_\_\_\_

