

**Superior Court of California, County of Orange
Foreclosure Relief Settlement Conference Program
Borrower Information**

To participate effectively in a settlement conference, your lender must consider your circumstances to determine possible options. Please complete this form to the best of your knowledge and bring the completed form, together with the other required documentation, to the Settlement Conference.

Borrower Information

Borrower name(s): _____

Loan Number: _____

Property Address: _____

City: _____ State: _____ Zip Code: _____

Is the property for sale? Yes No Listing date: _____ Price: _____

Realtor name: _____ Realtor Phone: _____

Borrower Occupied? Yes No Number of people in household: _____ How long? _____

Mailing address (if different): _____

City: _____ State: _____ Zip Code: _____

Phone Numbers: Home: _____ Work: _____

Cell: _____ Other: _____

Email: _____

Mortgage Information

First Mortgage Lender: _____ Type of Loan: _____

Loan Number: _____ Date You Closed Your Loan: _____

Second Mortgage Lender: _____ Type of Loan: _____

Loan Number: _____ Date You Closed Your Loan: _____

Total Mortgage Payment(s) amount: \$_____ Taxes & Insurance; \$_____

Date of last payment: _____

Primary Reason for Default: _____

Is the loan in Bankruptcy: Yes No

If yes, provide the names, location of court, case number and attorney: _____

Assets	Amount Owed	Value
Home	\$	\$
Other Real Estate	\$	\$
Retirement Funds	\$	\$
Investments	\$	\$
Checking	\$	\$
Savings	\$	\$
Other	\$	\$

Transportation	Model	Year	Amount Owed	Value
Automobile #1			\$	\$
Automobile #2			\$	\$
Other (vehicles, boats, motorcycles)			\$	\$

Income:

Employer(s)	Net Monthly Wage
1.	\$
2.	\$
3.	\$
Additional Income (Description – not wages)	Monthly Amount
1.	\$
2.	\$

Borrower Pay Days: _____ Co-Borrower Pay Days: _____

Monthly Expenses: (Include only expenses you are currently paying)

Expense	Amount	Expense	Amount
Mortgage	\$	Food	\$
2 nd Mortgage	\$	Utilities	\$
Automobile Payment(s)	\$	Condominium/Neighborhood Fees	\$
Auto Insurance	\$	Medical (not covered by insurance)	\$
Auto Fuel/repairs	\$	Other property payments	\$
Credit Card Payments	\$	Telephone/Cell Phone	\$
Installment Loan Payments	\$	Cable TV	\$
Child Support/Alimony	\$	Spending Money	\$
Day Care/Child Care/Tuition	\$	Other Expenses	\$

Amount Available for Monthly Mortgage Payments Based on Income and Expenses: \$ _____

Bring the following additional documentation to the Settlement Conference:

- ___ Proof of Income (minimum two months)
- ___ Last two bank statements
- ___ Proof of any expected income for the last 45 days
- ___ Copy of a current utility bill
- ___ Signed 4506-T form
- ___ Latest federal and California tax returns
- ___ Letter explaining reason for delinquency and any supporting documentation
- ___ Listing agreement (if property is currently on the market)