

BORROWER INFORMATION

Date: _____

Youngest Borrower Name: _____ DOB: _____

Oldest Borrower Name: _____ DOB: _____

Borrower's Phone Number: _____ Borrower's Email: _____

Property Address: _____

Lien(s): \$ _____ Est. Value: \$ _____ Needs: \$ _____ Goals: _____

Alt Contact: _____ Relationship: _____ Alt Contact Phone: _____

Alt Contact Email: _____

REFERRAL INFORMATION

Referred by: _____ Title _____

Phone: _____ / email _____ entered in RV: _____

PROPERTY INFORMATION –

Circle One: Single Family Home Condo Other

Prop Tax Amt: _____ Current? Y / N HOI Amt: _____ Current? Y/N

HOA Amt: _____ Current? Y/N

IF CONDO: HOA name/address/phone _____

IF CONDO: Mgmt Co name/address/phone _____

TITLE (circle one): Individual Joint Living Trust AB Trust Irrevocable Trust Other _____

NOTES

Initials	Date	Action

For a personalized, complimentary proposal, please Email:

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**Mutual of Omaha**

MORTGAGE