



Date:

Dear Client(s):

Thank you for your inquiry regarding our Foreclosure Intervention Services. In order to assist you with your request for a loan modification and/or a workout resolution with your Lender(s), please provide the following as soon as possible:

1. Personal Financial Statement (enclosed) – Please complete, sign, date, and return
2. Monthly Budget (enclosed)
3. Reason for Hardship letter – Please provide as much details of your current financial situation (source of your financial hardship, its expected duration and the financial resources with which you will manage your debt going forward).
4. If you are a SALARIED EMPLOYEE, please provide the following:
  - a. Copy of your most recent W2(s) & Personal Tax Return (1040's)
  - b. Copy of your most recent pay-stub(s) – One month's worth
5. If you are a SELF-EMPLOYED, please provide the following, if applicable:
  - a. Signed and dated copy of your most recent Personal Tax Return (1040's), including all schedules
  - b. Signed and dated copy of your most recent Corporate Tax Return, including all schedules
  - c. Signed and dated copy of year-to-date Profit & Loss Statement and most recent month-end and quarter-end Balance Sheet
6. Copies of your most recent monthly bank statement(s) for all accounts (checking, savings, IRA's, CD's, Money Market, etc.)
7. Copies of your most recent retirement account statement (i.e. 401K)
8. Copies of the Promissory Note(s) and your most recent payment notice(s)
9. Copies of your most recent HOA's payment notice, if applicable
10. Copies of your most recent Property tax and Homeowner's/Fire Insurance statements
11. Copies of any Notice of legal documents received (i.e. Notice of Default, Notice of Trustee's Sale, etc.).

If you have any questions, or need any clarification, please contact me at 858.586.7382

Sincerely,

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Counselor  
Foreclosure Intervention