





14. How much do you **owe** on the property?
- 6a. 1st mortgage pay-off amount: \_\_\_\_\_ payment \_\_\_\_\_ /mo.
- 6b. 2nd mortgage pay-off amount: \_\_\_\_\_ payment \_\_\_\_\_ /mo.
- 6c. 3rd mortgage pay-off amount: \_\_\_\_\_ payment \_\_\_\_\_ /mo.
15. Is the mortgage on your property the result of a refinance? **yes no**
16. Are there other liens on the property such as judgment liens, tax liens, sewer liens, Small Cities Grant liens, etc.? **yes no**  
 If yes, type of lien(s): \_\_\_\_\_
17. Are you behind on your mortgage payments? **yes no**  
 If yes, what was the last month you paid the mortgage? \_\_\_\_\_
18. Have foreclosure proceedings been started? **yes no**
19. If you do **not** currently own real estate, answer the following questions:
- a. Have you **ever** owned real estate? **yes no**  
 If yes, when did you sell or otherwise dispose of the property? \_\_\_\_\_  
 What were the circumstances: **sale to unrelated person sale to relative**  
**transfer in divorce foreclosure**
- b. Do you currently: **rent live with relatives/friends**

**PERSONAL PROPERTY**

20. What vehicles do you have?
- Car 1:** Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Miles \_\_\_\_\_  
 Is this car Leased \_\_\_\_\_ Financed \_\_\_\_\_ Owned outright \_\_\_\_\_  
 Loan balance \_\_\_\_\_ Monthly payment (loan or lease) \_\_\_\_\_  
 Your estimate of value \_\_\_\_\_  
 Whose name is this vehicle in (if not leased): \_\_\_\_\_ husband \_\_\_\_\_ wife \_\_\_\_\_ joint  
 \_\_\_\_\_ self (unmarried individual)
- Car 2:** Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_ Miles \_\_\_\_\_  
 Is this car Leased \_\_\_\_\_ Financed \_\_\_\_\_ Owned outright \_\_\_\_\_  
 Loan balance \_\_\_\_\_ Monthly payment (loan or lease) \_\_\_\_\_  
 Your estimate of value \_\_\_\_\_  
 Whose name is this vehicle in (if not leased): \_\_\_\_\_ husband \_\_\_\_\_ wife \_\_\_\_\_ joint  
 \_\_\_\_\_ self (unmarried individual)
21. Do you have more than 2 vehicles? \_\_\_\_\_
22. Are you behind on your auto payments? **yes no**  
 If yes, what was the last month you made a car payment? \_\_\_\_\_

Which car payment are you behind on? \_\_\_\_ car 1 \_\_\_\_ car 2 \_\_\_\_ both

23. How much money do you have in checking/savings accounts? \_\_\_\_\_
24. *Circle any of the following which you have:*  
IRA            401K            Pension            Annuity  
Credit Union account    money market fund    stock/bonds    mutual funds  
certificate of deposit    stamp/coin/other collections    antiques  
jewelry (in excess of \$1,000)
25. Do you have any life insurance that has cash surrender value, that is, that you can cash in?    **yes**    **no**
26. Has any relative of your died in the last year?    **yes**    **no**  
Do you expect to receive an inheritance?    **yes**    **no**
27. Do you usually receive a tax refund from the federal government?    **yes**    **no**  
If so, how much? \_\_\_\_\_
28. Do you usually receive a tax refund from the state?    **yes**    **no**  
If so, how much? \_\_\_\_\_
29. If you owe income taxes, for what years do you owe? \_\_\_\_\_  
Have you filed tax returns for each of these years?    **yes**    **no**
30. Do you have any law suits or claims which you can make against anyone for any reason whatsoever including personal injury, breach of contract, malpractice, etc?    **yes**  
**no**
31. Does anyone owe you any money?    **yes**    **no**
32. Do you have any other assets of significant value (not already mentioned)? **yes** **no**  
(Examples: boats, trailers, recreational vehicles, quads, jet skis)  
If yes, describe: \_\_\_\_\_
33. Have you paid any college tuition, fees or expenses on behalf of anyone (other than yourself) over the age of eighteen in the last two years?    **yes**    **no**
34. Have you taken out any loans (including Parent Plus loans) that were used to pay college tuition, fees or expenses for anyone (other than yourself) over the age of eighteen in the last two years?    **yes**    **no**

