



CLIENT INTAKE SUMMARY

Borrower	
Co-Borrower	
Property Address	

Contact Information

Telephone number (Daytime) Best time to call	
Telephone number (Evening) Best time to call	
Email address	

Property Type

Occupaney

	Single Family Residence			Primary Residence
	Condo/Townhouse			Investment Property
	1-4 Units			Second Home

Financing

Purchase 1 st Mortgage	Date	
	Interest Rate	
	Monthly Mortgage Payment	
	Current Balance	
	*Loan Program (ie. 1,2,3, or 5 yr Fixed, Interest Only, Payment Option ARM, 30 yr Fixed, Other)	
	*Original Lender	
	*City & State where the loan does were signed	
	Current Lender (If you have not refinanced)	
2 nd Mortgage	Subsequent Lender(if applicable)	
	Date	
	Interest Rate	
	Monthly Mortghage Payment	
	Current Banlance	
	*Loan Program (ie. 1,2,3 or 5 yr Fixed, Interest Only, Payment Option ARM, 30 yr Fixed, Other)	
	*Original Lender	
	*Current Lender (If you have not refinanced)	
Refinancing 1 st	Subsequent Lender (if applicable)	
	Date	
	Interest Rate	

3450 Wilshire Blvd #777 Los Angeles, California 90010
Tel:626-965-7070 info@sskwonlawfirm.com