



The Office of
David A. Bacharach
www.David-A.com

****YOUR PROCESS SERVING & LEGAL SUPPORT SERVICES *BOUQTIQUE!*™****

Phone: 718-906-1375 Fax: 845-634-3056 E-mail: ClientServices@David-A.com

Note Analysis Worksheet

This worksheet must be completed before anyone can make a determination of what the note is worth. The sooner we have this information, the sooner we can get back to you with a quote on your note! Please make sure that you provide all of the information on this worksheet. Please indicate if there are any items below which do not apply to your specific note (and provide any additional information about your specific note which may not have been requested below). Thank you for giving us the opportunity to 'serve' you!

Name : _____

Date: _____

Address: _____

Phone #: _____

Property Information

Property Address:

Type Of Property: _____

Owner Occupied: _____

Property Value: \$ _____ Established By: _____

Date: _____

Payor's Credit Score: _____

1st loan Amount: \$ _____ Monthly Pmt: \$ _____ New / Assumed

2nd loan Amount: \$ _____ Monthly Pmt: \$ _____ New / Assumed

Down Pmt Amount: \$ _____ LTV: _____% ITV: _____%

Note Information

Original Amount \$ _____ Balance \$ _____

As of: _____

Interest Rate : _____%

Payment Amount : \$ _____

Date of 1st Payment : _____

Original Length: _____ mos.

Type: Amort, I/O, Other _____

Number of Payments Made: _____

Number Remaining: _____

Are the payments on time: _____ What day of the month are they due _____

Balloon Payment if any: \$ _____

Are there any Clauses:

Seller Information

Your Motivation to sell: _____

When do you need to close: _____

Have you received any other offers: \$ _____

What does the Payor do for a living:

Is there anything else we should know:



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INFORMATION FOR TRUST DEED / CONTRACT SALE

Your Trust Deed / Contract Sale can be processed faster when you follow these suggestions. Once we have provided you a quote on your Trust Deed / Contract, and you have decided to proceed with the sale, please be prepared to send the documents listed below to our office as soon as possible.

- Copy of Note
- Copy of Trust Deed, Mortgage or Land Contract
- Escrow instructions from real estate sale in which the Trust Deed / Contract was created
- Escrow closing statement from real estate sale in which the Trust Deed / Contract was created
- Title insurance policy which insures the Trust Deed / Contract
- Fire insurance information on the property which secures the Trust Deed / Contract (Insurance Company, Policy Number, Agent's Name and Address)
- Loan Payment Record

Please check off the above items when assembled and then call our office to proceed with the process. Of course, if you have any questions, you may call us any day, any time 24-7!

**Your signature is required for us to confirm balances, payment history and to obtain copies from your title or escrow company in the event we need further information.

Thank you.

**Your Signature: _____

Title / Escrow Company: _____ Policy #: _____