

Mortgage Assignment Program Request for Financial Information

U.S. Department of Housing
and Urban Development
Office of Housing / Federal Housing Commissioner

OMB Approval No. 2502-0159 (exp. 9/30/97)

Important: No lender, including HUD, may discriminate against you in giving credit because of your race, sex, age, or marital status. Complaints about discrimination by lenders for these reasons should be sent to the Federal Trade Commission, Equal Credit Opportunity, Washington, D.C. 20580.

Read the Privacy Act and Public Reporting Burden Statements on the last page.

Property Address: ((include city, state & zip code))	HUD/FHA Case Number:	Lender's Name & Address:	HUD Account No:
	Mortgage Loan Number:		

Borrowers' Names: List all persons whose names appear on your mortgage or note.	Address: (if different from property address, above)	Phone No: (day/evening)
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Do you collect rent for any part of this house? Yes No If "yes," how much rent per month do you collect? \$

Household Composition & Income. List the name of every person who lives at the address and give all requested information about each person. This form asks three questions about income: 1. How much did each person make last year (broken down by where the money came from); 2. How much does each person make right now. 3. How much does each person expect to make in the next 12 months (including raises, overtime, part time jobs, etc.). Show all money received, no matter where it comes from. Also, list the Social Security number (SSN) of all household members age six years and older.

Name	Social Security Number	Age	Sex	Relation ship	1. Last Year's Income, Retirement, or Benefits Payments						2. Current Income		3. Expected Income for Next 12 Months
					Wages or Salary	Social Security	Disability	Unemployment	Welfare	Other	<input type="checkbox"/> Wkly <input type="checkbox"/> Yrly	<input type="checkbox"/> Mnthly	
				head									
				Total									

Federal Tax. If pay stubs are not available, complete this section for each family member above (other than minors) who submitted a Federal Income Tax Return.	Taxpayer:	Date of Return:	Adjusted Gross Income:	Taxpayer:	Date of Return:	Adjusted Gross Income:

Sources of Income. Show where all the money under "Current Income" comes from. If anyone has income from more than one source, use more than one line. "Source" is the name of the person, company, government agency, etc. from which money comes. Attach additional pages if necessary.	Name:	Source: (job, unemployment, etc.)	Address of Source:	Telephone:	Monthly Amount:

Has the borrower filed for bankruptcy? Yes No Does the borrower receive food stamps? Yes No If "yes," enter the dollar value of the stamps: \$

Do you expect future income? (Insurance claims, disability claims, lawsuits, alimony and child support, rent, etc.)				
Person to Receive Added Income	When:	From What Source:	Lump Sum:	Monthly Amount:

Assets: How much money do you have in....

Savings Account:	Cash or Money Orders:	Checking Account:	Savings Bonds:	Life Insurance: (cash value)
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Real Estate you Own Beside your House:

Description of Property:	Purchase Price:	Monthly Payments:	Monthly Rental Income, if any:

Monthly Deductions from Gross Income	Amount	Remarks (if any)
Federal Income Tax	\$	
State Income Tax	\$	
Local Taxes (personal property, school, city, etc.)	\$	
Social Security and/or Retirement	\$	

Monthly Expenses - Include loan payments or other expenses deducted from pay check

Second Mortgage	\$	
Electricity, Gas, and Oil	\$	
Water and Sewer	\$	
Hazard Insurance	\$	
Home Maintenance Repairs	\$	
Telephone <u>Include Cell Phone</u>	\$	
Food	\$	
Clothing	\$	
Transportation	\$	
Auto Insurance	\$	
Medical (premiums and bills not paid by insurance) <u>Co-pays, monthly prescriptions</u>	\$	
Life Insurance	\$	
Education, Tuition, Books <u>Include student loans</u>	\$	
Installment Payments (see below)	\$	
Alimony, Child Support <u>Provide documentation paying or receiving</u>	\$	
Other <u>Cable or satellite TV, internet, tithes to church, alarm services, club memberships, day care, HOA dues, etc.</u>	\$	

Installment Payments in detail:	Date Opened	Purpose	Present Balance	Monthly Payment	Date of Last Payment	No. of Paymts Past Due
To whom paid						

Describe any **Emergency Repairs** necessary on your house. (heat, plumbing, electrical, roof, etc.) Attach additional pages if necessary.

Circumstances: Explain in your own words why you got behind in your mortgage payments. To obtain help from HUD, the reasons that you fell behind in your mortgage payments must have been beyond your control. Some examples of such reasons are: You or your household had reduced income because of loss of a job, death, divorce, or illness; or you or your household had increased expenses because someone in the household was injured, became ill, or died. There may be other reasons that make you eligible for help. Please explain, in your own words, why you were not able to make your mortgage payments. Attach additional pages if necessary.

Reasonable Prospects: Explain how you expect to make the full monthly mortgage payments in the future. There are many ways in which you can do that. For example, if you missed payments because you lost your job, you should state (if) you expect to get a new job. If you are ill or injured, you can state when your doctor expects you to recover and go back to work. If you have applied, or plan to apply, for some form of government assistance, please include that in your answer. If you have had increased expenses, you should state how you expect to pay them and when you expect to be able to continue making your mortgage payments. Attach additional pages if necessary.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 USC 1001, 1010, 1012; 31 USC 3729, 3802)

Signature(s) & Date:

X

Public reporting burden for this collection of information is estimated to average 0.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Paperwork Reduction Project (2502-0159), Office of Information Technology, U.S. Department of Housing and Urban Development, Washington, D.C. 20410-3600. This agency may not conduct or sponsor, and a person is not required to respond to, a collection information unless that collection displays a valid OMB control number.

Do not send this form to the above address.

Privacy Act Statement: The Department of Housing and Urban Development (HUD) is authorized to collect the information requested on this form by Public Law 479, 48 statute 1246, 12 U.S.C., 1701 et seq. and by the Housing and Community Development Act of 1987, 42 U.S.C. 3543 which authorizes the collection of the Social Security Number (SSN). HUD uses this information to help in determining the type of relief, if any, that can be provided to assist you in avoiding foreclosure of your mortgage. This information will be used to determine whether HUD will accept assignment of your mortgage in which case HUD would become your lender. If HUD is already your lender, this information will help HUD determine whether additional relief is warranted. In addition, HUD uses your SSN to request a credit report on you which will help HUD in verifying your financial situation. The financial information will assist HUD in determining how much you can pay on your mortgage. The information you provide will be disclosed to the credit report agency. In addition, HUD may disclose certain information to Federal, State and local agencies when relevant to civil, criminal, or regulatory investigations and prosecutions. It will not be otherwise disclosed or released outside of HUD, except as required and permitted by law. Failure to provide any of the required information may result in HUD not accepting the assignment of your mortgage. Providing the SSN is **mandatory** and failure to provide it could affect your participation in HUD programs.

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