

LAW OFFICES OF ADELA Z. ULLOA

A Professional Law Corporation

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CLIENT INTAKE FORM

1. Name of Borrower: _____
2. Home Phone: _____
3. Cell Phone: _____
4. Email: _____
5. Name of Co-Borrower: _____
6. Home Phone: _____
7. Cell Phone: _____
8. Email: _____
9. Address of Property: _____

10. How many mortgage payments have you missed? _____
11. How many loans do you have secured by the property? _____
12. Lender: _____
13. Current phone number for Lender: _____
14. Have you had any repayment plans or workout solutions with your current lender? If so, describe: _____

15. Servicer: _____

16. Current phone number for Servicer: _____

17. Are your property taxes current? _____
18. Have you filed for bankruptcy or are you planning on filing for bankruptcy?

19. Have you received a Notice of Default? Was it via certified mail? _____
- _____
20. Have you received a Notice of Trustee Sale? Was it via certified mail? _____
- _____
21. Do you have equity in your property? How much? _____
- _____
22. Have you had a forensic audit performed on your loan(s)? _____
- _____
23. Do you have counsel defending you in your eviction (unlawful detainer) case?
24. Are there any outstanding judgments against any of the homeowners? _____
- _____
25. Are you a party to any lawsuits? _____
26. Are you obligated to pay any child support or alimony? _____
- _____
27. Do you have past obligations owed to or insured by any agency of the federal government? _____
28. Have you recently been turned down for credit? _____
29. Have you submitted your own loan workout request to your lender within the last 12 months? _____
30. If YES, what is/was the status of the loan workout application? (Had they requested additional information, had they provided you with a denial, had they promised you that a sale would be postponed pending review of the application; please provide any and all DETAILED relevant facts).
- _____
- _____

31. If denied, did the written denial advise you that you had a right to appeal the denial within 30 days? _____

32. If denied, did the written denial give you specific reasons as to why your application was denied? _____

33. Have you recently been turned down for help by any other agency or loss mitigation company? _____

34. Do you have any other credit or financial problems? _____

35. Is your main goal to stay in your home? _____

RETAINING OUR FIRM TO REPRESENT YOU IN SEEKING A LOAN MODIFICATION OR LOSS MITIGATION ALTERNATIVE DOES NOT MEAN WE REPRESENT YOU IN A WRONGFUL FORECLOSURE OR UNLAWFUL DETAINER (EVICTION) ACTION. REPRESENTATION IN THESE ACTIONS REQUIRES A SEPARATE RETAINER AGREEMENT AND SEPARATE PAYMENT.

Date: _____

Homeowner

Date: _____

Homeowner