



Information to Gather Before You Contact a Housing Counseling Agency

Having this information nearby will help your counselor build an accurate assessment of your financial situation

Information about Your Home:

Mortgage Loan Number:

Is Your Property for Sale? Yes No

If for Sale, Realtor Name:

Assets

Asset	Amount Owed	Value
Home	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Other Real Estate	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Retirement Funds	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Investments	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Checking	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Savings	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Automobile(s)	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>
Other	\$ <input style="width: 80px;" type="text"/>	\$ <input style="width: 80px;" type="text"/>

Monthly Income

Income	Amount
Monthly Wage	\$ <input style="width: 80px;" type="text"/>
Monthly Wage	\$ <input style="width: 80px;" type="text"/>
Additional Income	\$ <input style="width: 80px;" type="text"/>
Additional Income	\$ <input style="width: 80px;" type="text"/>

Monthly Expenses

Expense	Amount
Mortgage	\$ <input type="text"/>
Auto Payment	\$ <input type="text"/>
Auto Insurance	\$ <input type="text"/>
Auto Fuel/Repairs	\$ <input type="text"/>
Credit Card Payments	\$ <input type="text"/>
Child Support/Alimony	\$ <input type="text"/>
Day Care/Tuition	\$ <input type="text"/>
Food	\$ <input type="text"/>
Utilities	\$ <input type="text"/>
Medical (Not covered by insurance)	\$ <input type="text"/>
Phone	\$ <input type="text"/>
Cable TV	\$ <input type="text"/>
Entertainment	\$ <input type="text"/>
Other Expenses	\$ <input type="text"/>
	\$ <input type="text"/>
	\$ <input type="text"/>
	\$ <input type="text"/>
	\$ <input type="text"/>

Other Information

If possible, try and gather your most recent:

- Pay stubs
- Benefit statements from Social Security, disability, unemployment, retirement, or public assistance.
- Tax return
- Mortgage payment statement