**Call Script:**

**Hi,**

**My name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**I am an investor that pays cash for real estate notes. I am calling about your note on the property located at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**If you were to consider selling the note, what would you need to get for it?**

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**Message Script:**

**Hello, My Name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

**I am a note investor who pays cash for notes against real estate. I am interested in the note you recently funded.**

**Please call me directly at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

**Again, may name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, calling about the note you recently funded.**

**I pay cash and close quickly. Please call me at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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**Owner Information:** Lead Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Owners Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Note Information: (Ask, “What can you tell me about the note?”)**

Asking Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Original Value: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Written: \_\_\_\_\_\_\_\_

Pay History/Is it Current: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Servicer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Rate & Terms: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note Type/Lien Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Underwriting Documentation Available (App, credit/background check, bank statements, etc.)

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**Property Information:**

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State: \_\_\_\_\_\_ Zip: \_\_\_\_\_\_\_\_\_

Estimated Value? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Style**: Ranch, 2-Story, BiLvl, TriLvl, Stick-Built, Modular, Mobile

**# Beds:** \_\_\_\_\_\_\_ **# Baths:** \_\_\_\_\_\_\_\_ **Garage:** # of Cars \_\_\_\_\_\_\_\_ Attached, Detached

**Rooms:** Fam, Rec, Den, Office, Dine, Loft, Sun, **OutBldg:** Shed, Barn, Dog Pen

**Heating:** FAG, FAE, WoodStv, FirePlc, Solar, ElecBaseboard, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**A/C:** None, Central, Windows,

**Hot Water:** Installation Date \_\_\_\_\_\_\_\_ Tank, On Demand, NGas, Electric

**Basement Type:** None, Crawl, Partial, WlkOut, Full **Finishing:** Unf, Partial, Full

Main SF \_\_\_\_\_\_\_ Bsmt SF \_\_\_\_\_\_\_ Other SF \_\_\_\_\_\_\_\_ Total SF \_\_\_\_\_\_\_ Lot Size \_\_\_\_\_\_\_\_

**Property Taxes**: $\_\_\_\_\_\_\_\_\_\_\_\_ **Year Blt**: \_\_\_\_\_\_\_\_\_\_ **Year Remodeled**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Condition: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Contact Record**

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| **Date** | **Form of Contact**  Call, Email, Visit, Text, Etc. | **Notes** |
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