

New Client Intake Form

	Spouse 1	Spouse 2
Name		
Property Address		
Phone		
Email		
Communication Permission	Email Phone / Text	Email Phone / Text
Communication Preference		
Current Occupant	Yes / No	Yes / No
Referred By		
LEGAL		
Attorney Name		
Attorney Phone Number		
Is there a court order to sell the property?		
What are the relevant terms in that order or agreement?		
Is there a restraining order?		
FINANCIAL		
Number of Mortgages		
Mortgage company(es)		
Balance of Mortgages		
Are payments current?		
Forbearances or loan modifications?		
In foreclosure?		
HOA dues current?		
Are there any solar loans, PACE, HERO?		
Judgments or liens? (IRS, etc.)		
CLOSING		
Expected Value of House		
Goals: sell quickly, for most, not sell and stay		
Post-Sale Plan: Rent/Buy		
Notes		
Appointment Day/Time		