

Helpful Hints

- 1) Upload Checklist of Damages
 - a. Please describe any damages to the property.
 - b. If not applicable, please upload sheet stating damages n/a
- 2) Income and Asset Analysis Form
 - a. This comes from the welcome package (pages 11-12)
 - b. Please make sure the monthly income amount matches Pay Stubs or Award letters being sent
- 3) Acknowledgement and Agreement – please upload the following 3 documents from the welcome package
 - a. Acknowledgement and Agreement (page 13)
 - b. Authorization and Acknowledgment (page 5)
 - c. General Information Form (page 8)
- 4) Month 1 Pay stubs
 - a. Please upload all pay stubs here
 - b. Most recent 30 consecutive days for forms of employment
 - c. If unemployed receiving benefits
 - i. Upload a signed and dated letter and the unemployment award letter specifying amount received
 - d. If unemployed with no benefits
 - i. Upload a signed and dated letter of explanation explaining the date of unemployment and no benefits received
 - e. If receiving SSI, Disability, Retirement, etc
 - i. Upload award letter specifying amount received
 - f. Please combine all into 1 document
- 5) Month 1 recent bank statements
 - a. Please upload all checking and savings account statements here
 - b. Please do not send online printouts or transaction history printout, actual statements are required
 - c. Please upload all pages, including blank and information pages. If the 1st page says 1 of 5 I need all 5 pages. If the bottom states “continued on next page” I need the next page.
 - d. Please review for transfers. If there are any transfers in or out of the account a signed and dated letter of explanation is required. If these accounts being transferred to or from are in the homeowner’s name, I need all statements.
- 6) Occupancy Certification
 - a. This is page 10 of the welcome package
- 7) RFD
 - a. Please upload page 9 of the welcome package along with the homeowners signed and dated RFD letter
- 8) Financial Information Task
 - a. Please make sure this information matched the above “Income and Asset Analysis Form”
- 9) Third Party Authorization
 - a. This is pages 6-7 of the welcome package
 - b. This form will be uploaded in a separate task

Status: Offer Submission: Accept Assignment			
Add Photo	Type: Lender Lender: BAC SS Occupancy:	List Date: 03/18/13 Close Date: TBD List Price: TBD	BAC Specialist: Edwina Jacobs Listing Agent:
Tasks: <input type="text" value="2"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="3"/>		Offers: <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/>	Expenses: <input type="text" value="\$"/> <input type="text" value="0"/> <input type="text" value="\$"/> <input type="text" value="0"/> <input type="text" value="\$"/> <input type="text" value="0"/>
One View Information			
Required Documents			
Acknowledgement Agreement, Month 1 Paystub, Month 1 Recent Bank Statement, Occupancy Certificate, RFD Letter, Signed Income and Asset Analysis Form			
Home Owner's Document Collection			
Reason for Default: Curtailment of Income			
Whose income has been affected?:		<input type="text"/>	
What has caused the reduction in income?:		<input type="text"/>	
What are you doing to supplement your income?:		<input type="text"/>	
Is this short-term/long-term?:		<input type="text"/>	
Do you plan on keeping the property?:		<input type="text"/>	
What other resources do you have?:		<input type="text"/>	
Upload Checklist of Damages:		<input type="text"/> Browse...	
Upload Income and Asset Analysis Form:		<input type="text"/> Browse...	
Additional Information			
Acknowledgement Agreement:		<input type="text"/> Browse...	
Month 1 Paystub:		<input type="text"/> Browse...	
Month 1 Recent Bank Statement:		<input type="text"/> Browse...	
Occupancy Certificate:		<input type="text"/> Browse...	
RFD Letter:		<input type="text"/> Browse...	
Signed Income and Asset Analysis Form:		<input type="text"/> Browse...	
Save and Submit Later		Save and Submit Now	
<i>Fields are Required</i>			