

IN THE CIRCUIT COURT  
FOR THE THIRD JUDICIAL CIRCUIT  
MADISON COUNTY, ILLINOIS

\_\_\_\_\_) )  
\_\_\_\_\_) )  
Plaintiff, ) )  
\_\_\_\_\_) )  
vs. ) No. \_\_\_\_-CH-\_\_\_\_ )  
\_\_\_\_\_) )  
\_\_\_\_\_) )  
Defendant. ) )

**HOMEOWNER'S FINANCIAL QUESTIONNAIRE**

Please complete this form and bring it with you to the Initial Intake Conference. Notice of the date, time and location of that meeting will be provided to by mail. The information you provide will be used by the mediation administrator to make an initial determination if the case is suitable for mediation. **This information will not be shared with anyone else unless you agree, and then only with a representative of your lender.**

**Borrower:**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Marital status: \_\_\_Married \_\_\_Separated \_\_\_Unmarried (single, divorced, widowed)  
Number of People in Household: \_\_\_\_\_  
Is Borrower a Veteran: \_\_\_Yes \_\_\_No

**Co-Borrower (if applicable):**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Marital status: \_\_\_Married \_\_\_Separated \_\_\_Unmarried (single, divorced, widowed)

**Borrower's Attorney or Housing Counselor (if applicable):**

\_\_\_ Attorney \_\_\_ Housing Counselor  
Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
E-mail: \_\_\_\_\_

**Mortgage Loan Information:**

Current Servicer: \_\_\_\_\_

Loan Number: \_\_\_\_\_

Original Purchase Price: \_\_\_\_\_

Estimated Current Value of the Home: \_\_\_\_\_

Condition of the Property:    \_\_\_ Excellent    \_\_\_ Good       \_\_\_ Fair       \_\_\_ Poor

Term of Mortgage: \_\_\_\_\_

Interest Rate: \_\_\_\_\_ Fixed or Adjustable? \_\_\_\_\_

Monthly Payment: \_\_\_\_\_ Number of missed payments: \_\_\_\_\_

Does the monthly payment include property taxes and insurance? \_\_\_ Yes \_\_\_ No

If not, what is the amount of your monthly taxes and insurance? \_\_\_\_\_

Are you current on taxes and insurance? \_\_\_\_\_

Are there any other mortgages or liens on this property (i.e. home equity loans, tax liens, child support liens, judgments from lawsuits)? \_\_\_ Yes       \_\_\_ No

If yes, please list the type of loan, the lender, the amount of the loan, and whether it is past due: \_\_\_\_\_

\_\_\_\_\_

**What caused you to miss payments (check all that apply):**

\_\_\_ Injury/Illness

\_\_\_ Adjustable Interest Rate/Balloon Payment

\_\_\_ Loss of Employment

\_\_\_ My Expenses Exceed My Income

\_\_\_ Other, please explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If you missed payments due to injury or illness, are you now well? \_\_\_ Yes \_\_\_ No, please explain:

\_\_\_\_\_

\_\_\_\_\_

If you missed payments due to unemployment, do you have a job now? \_\_\_ Yes \_\_\_ No

**Household Assets:**

Checking Accounts: \_\_\_\_\_

Savings: \_\_\_\_\_

Stocks/Bonds: \_\_\_\_\_

Other Cash on Hand: \_\_\_\_\_

Other Real Estate: \_\_\_\_\_

**Monthly Household Income:**

Monthly Gross Wages: \_\_\_\_\_

Social Security: \_\_\_\_\_

Child Support/Alimony: \_\_\_\_\_

Pensions/Annuities/Retirement Plans: \_\_\_\_\_

Tips/Commissions/Bonuses/Self employed Income: \_\_\_\_\_

Rents Received: \_\_\_\_\_  
Unemployment Income: \_\_\_\_\_  
Food Stamps/Welfare: \_\_\_\_\_  
Other (investment income, royalties, interest, dividends, etc): \_\_\_\_\_  
Total Monthly Income: \_\_\_\_\_

**Monthly Household Expenses:**

Monthly Mortgage Payment (including taxes and insurance): \_\_\_\_\_  
Credit Card/Installment Loans (total minimum payment per month): \_\_\_\_\_  
Alimony/Child Support: \_\_\_\_\_  
Car Payments: \_\_\_\_\_  
Car Insurance: \_\_\_\_\_  
Car Gas and Maintenance: \_\_\_\_\_  
Utilities: \_\_\_\_\_  
Communications (telephone and internet): \_\_\_\_\_  
Food: \_\_\_\_\_  
Medical Expenses: \_\_\_\_\_  
Student Loans: \_\_\_\_\_  
Miscellaneous: \_\_\_\_\_  
Cable: \_\_\_\_\_  
Health Insurance: \_\_\_\_\_  
Total Monthly Expenses: \_\_\_\_\_

Are you in the process of filing bankruptcy or are you thinking about bankruptcy? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is there any other information that would be helpful in determining whether your case would be suitable for mediation? If so, please describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I affirm, under penalty of perjury, that the foregoing statements are a true, accurate, full and complete reporting of all my assets and liabilities. I consent to disclosure of this information to the plaintiff's representative.

\_\_\_\_\_  
Homeowner's Signature \_\_\_\_\_  
Date

\_\_\_\_\_  
Co-Owner's Signature (if applicable) \_\_\_\_\_  
Date