

**SECURITIZATION MORTGAGE AUDIT QUESTIONNAIRE**  
**(If you cannot remember just leave blank)**

Present Lender Name: \_\_\_\_\_

Lender Loan/Account #: \_\_\_\_\_

Is this a refinance or a purchase loan? Refinance / Purchase

Borrower's Social Security Number (Needed for Securitization Audits Only): \_\_\_\_\_

Did you provide the Mortgage? Yes / No / N/A

Did you provide the Note? Yes / No / N/A

Did you provide collection notices (i.e., Affidavits, Notice of Defaults, Assignment, etc.)? Yes / No / N/A

Did you check Fannie Mae & Freddie Mac websites to see if your loan is not owned by them? Yes / No / N/A

Would you like an Attorney Consultation or Referral? Yes / No / N/A

Date of Closing:

Is MERS involved: \_\_\_ YES / \_\_\_ NO [If yes please provide the MIN #] -  
\_\_\_\_\_

Is the Loan a: \_\_\_ First or \_\_\_ Second

Is the loan a HELOC? \_\_\_ YES / \_\_\_ NO

Type of Housing: \_\_\_ Condo \_\_\_ Single Family \_\_\_ PUD \_\_\_ Commercial

Type of Loan: \_\_\_ Purchase \_\_\_ Refinance \_\_\_ Equity takeout

Type of Purchase: \_\_\_ Investment \_\_\_ Owner Occupied

Please scan and email a complete copy of the following documents for the property.

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Deed of Trust or Mortgage</li><li>• Note or Rider</li><li>• Assignment of Deed or Mortgage</li><li>• Substitution of Trustee</li></ul> | <ul style="list-style-type: none"><li>• Notice of Default</li><li>• Notice of Trustee's Sale</li><li>• Deed Upon Trustee's Sale</li></ul> |
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