



Jill B. Brakeman

Attorney • Collaborative Divorce Counselor

Law Office & Mediation Center

174 West Street • Suite 211

Litchfield, CT 06759

(860) 567-3404 • www.brakemanmediation.com

REFINANCE/HELOCS

Client Data Sheet to be filled in and returned to our office.

Property: _____ Date: _____

CLIENT:

Client #1: _____ SS# _____

Client #2 _____ SS# _____

Street: _____

Box: _____

Town/State/Zip: _____

Telephone: Home: _____

Work: _____

Cell: _____

E-Mail: _____

LENDER: _____

Contact _____ Loan Amount _____

Address _____ to be Borrowed _____

Town _____

Phone: _____ Fax: _____

Cell: _____ E-Mail: _____

PLEASE COMPLETE THE INFORMATION BELOW FOR ALL DEBTS TO BE PAID OFF AT CLOSING

Type	Creditor Name and Address	Account Number	Phone/Fax	Payoff Estimate
Mortgage	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
HELOC Home Equity Line	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
Other ie: credit card	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
Other	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

(cont.)

****Important Information Needed for the mortgage/credit card payoffs.**

Please bring to the closing for each credit card payoff the most recent credit card statement AND the credit card mailing envelopes. If mailed without the recent statements and in their envelope the payment “may be delayed, accruing interest to your account after the closing.”

What will be the last date you make your mortgage/credit card payment before the closing?

Month _____ Day _____

(Please list other dates for any additional payoffs)

Please Provide Name & Phone of Homeowner's Insurance Agency (provide address please if available)

Agent: _____

Insurance Company: _____

Phone: _____

Fax: _____

Policy #: _____

Address: _____

Comments or Issues to Note:



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Jill B. Brakeman

Legal Assistants:
Amie L. Olmstead
Pamela Styers
Allison Boender

AUTHORIZATION TO RELEASE INFORMATION

Date:

Name:

Address:

To Whom It May Concern:

“You are hereby authorized to release any and all information as may be requested by my attorney, namely Jill B. Brakeman, or her staff, as it pertains to my credit or mortgage loan account with you.

Thank you for your time and attention to this matter.

Sincerely yours,
