

Mortgage Servicer Call & Follow-Up Log

Use both pages for one conversation. Check each question group you discuss.

Mortgage servicer

Phone number

Call date and time

Representative / department / reference number

Scheduled foreclosure sale date (MM/DD/YYYY)

Sale time / time zone (if known)

Questions to ask - record the answers directly below each group.

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How much do I owe, including fees?

Can I get an itemized reinstatement quote and its expiration date?

Notes - question 1

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Has foreclosure started? Is a sale scheduled?

What is the sale date, and how can I confirm its current status?

Notes - question 2

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What type of loan do I have, and who owns or guarantees it?

What mortgage assistance is available for my loan? How do I apply?

Notes - question 3

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Which documents are needed, and how do I send them?

How can I confirm receipt and keep proof of submission?

Notes - question 4

Type, save a copy, and print. Or print and complete by hand. Keep your copy safe.

Personal organizer, not a mortgage-assistance application or a substitute for counseling.

Guidance: HUD Handbook 7610.1, Ch. 3; Fannie Mae/Freddie Mac Form 710; VA borrower resources.

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Servicer / call date (to keep both pages together)

☐

Is my application complete? When was it received?

What is missing, and when should I expect a decision or written notice?

Notes - question 5

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What deadlines apply? What happens to the sale during review?

If denied, why? Is review or appeal available, and by what deadline?

Notes - question 6

Answers / assistance discussed / payment terms

Documents requested / how to send them / deadline

Next step / who will do it / by when / promised callback

Request written terms. Do not assume a call or application postpones a sale.

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