



New Contract Intake Form

SECTION 1: Parties' Information

Primary Seller/Mortgagee Information:

Full Legal Name: _____

Preferred Name or Contact: _____

Mailing Address: _____

Phone Numbers: _____

Email Addresses: _____

Primary Buyer/Mortgagor Information:

Full Legal Name: _____

Preferred Name or Contact: _____

Mailing Address: _____

Phone Numbers: _____

Email Addresses: _____

SECTION 2: Property Information

Property Address: _____ Parish: _____

SECTION 3: Communication Preferences

Seller:

☐ Email

☐ Phone or Text

☐ Both

Buyer:

☐ Email

☐ Phone or Text

☐ Both



SECTION 4: Sale Terms

Purchase Price: \$ _____

Down Payment: \$ _____

Financed Amount: \$ _____

Purchase Price minus Down-Payment

Interest Rate: _____ %

Term of Contract (in years): _____

First Payment Due Date: ____ / ____ / ____

Final Payment (Balloon, if any): on ____ / ____ / ____

SECTION 5: Additional Terms

Escrowed:

Property Taxes

☐ Yes ☐ No

Types of Insurance Required:

Escrowed:

Maintained by:

☐ Hazard

☐ Yes ☐ No

Buyer / Seller

☐ Flood

☐ Yes ☐ No

Buyer / Seller

☐ Wind & Hail

☐ Yes ☐ No

Buyer / Seller

☐ General Liability

☐ Yes ☐ No

Buyer / Seller

☐ Builders Risk

☐ Yes ☐ No

Buyer / Seller

☐ Renters

☐ Yes ☐ No

Buyer / Seller

Will the Buyer occupy the property? ☐ Yes ☐ No

Any existing liens or mortgages on the property? ☐ Yes ☐ No

- If yes, provide detail: _____

SECTION 6: Supporting Documents Required

[] Copy of Seller's ID

[] Copy of Buyer's ID

[] Proof of Property Insurance (or quote)

[] Tax Bill (if available)