Mortgage escrow statement review worksheet

Track the figures and questions in an escrow analysis.

DATE / QUOTE DATE

RECORD YOUR FIGURES AND QUESTIONS

Statement date and servicer

Annual property tax estimate

Insurance estimate

Shortage or surplus shown

Proposed monthly escrow amount

Questions and supporting bills

QUESTIONS TO RESOLVE

- [ ] Do estimates match recent bills and notices?
- [ ] Are a shortage payment and ongoing escrow separated?
- [ ] Has the servicer explained available payment choices?

NEXT ACTION / WHO TO CONTACT / FOLLOW-UP DATE

Official background: https://www.consumerfinance.gov/consumer-tools/

fintoku.com/resources/loan-library/

Use current written terms. This worksheet organizes your notes; it does not calculate approval or eligibility.