

[Your firm name and logo]

Lender: [Lender name]

Loan number: [Loan number]

Borrower: [Borrower name] Co-borrower: [Co-borrower name]

Scheduled note date: [Note date]

Call date and time: [Date, time]

Verbal verification of employment, call record

Timing check

Business days between this call and the note date: [number]. Window that applies: [employee / extended with recent pay-period proof / self-employed or K-1 under 25% / FHA / DU close-by date]. Within window: [Yes / No].

Employer

Employer name and address as shown on the latest pay stub or W-2 form: [Employer legal name, address].

Phone number and where it came from

Number dialed: [phone]. Found through: [directory listing / employer website / state business registry / vendor]. Number supplied by the borrower, for comparison only: [phone].

Method

Verified by: [phone / written / vendor (vendor name)]. Reference or report number, if any: [number].

Person reached

Name: [name]. Title: [title]. Department: [HR / payroll / management].

Answers

Currently employed: [Yes / No / On temporary leave, expected return [date]]. Position: [title]. Start date: [date]. End date, if any: [date]. Status: [full time / part time / seasonal / temporary]. Base pay, if shared: [amount or "declined"].

Result

[Verified / Not verified / Discrepancy]. If there is a discrepancy with the loan application, describe it: [title, start date or status that differs].

Self-employed borrower (optional)

Evidence the business exists and still operates: [registry listing / CPA letter / business license / phone listing], obtained on [date].

After closing (optional)

Completed after closing on [date], before loan delivery on [delivery date].

Verified by: [Processor name], [NMLS or employee ID]

Signature: _____ Date: _____