

Very Important: Who should we thank for putting us in touch?		
SECTION 1: About You	BORROWER <input type="checkbox"/> Married <input type="checkbox"/> Unmarried	CO-BORROWER <input type="checkbox"/> Married <input type="checkbox"/> Unmarried
FULL NAME		
HOME ADDRESS		
CITY/STATE/ZIP CODE		
HOW LONG AT THIS HOME?		
EMAIL ADDRESS		
HOME PHONE		
CELL PHONE		
SECTION 2: Your Work	Work Phone:	Work Phone:
EMPLOYER		
POSITION/TITLE		
YEARS AT JOB		
ANNUAL INCOME		
CAN YOU PROVIDE	<input type="checkbox"/> W-2 <input type="checkbox"/> 1099 <input type="checkbox"/> Paystub <input type="checkbox"/> None Apply	<input type="checkbox"/> W-2 <input type="checkbox"/> 1099 <input type="checkbox"/> Paystub <input type="checkbox"/> None Apply
SECTION 3: Your Credit	Estimated FICO:	Estimated FICO:
Have you had a bankruptcy or foreclosure in the past 7 years	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you been late on your mortgage in the last 2 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 1 st time homebuyer	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 1 st time homebuyer
SECTION 4: Your Perfect Refinance Scenario		COMBINED ASSETS
Home to be refinanced is your:	<input type="checkbox"/> Primary home <input type="checkbox"/> 2 nd home <input type="checkbox"/> Investment	Checking/Savings:
Estimated home value	\$ _____	Stocks/Mutual Funds:
Loan Balance/Est. Interest Rate	\$ _____ / _____ %	IRA/401k/Other:
Desired Loan Amount	\$ _____	CURRENT MONTHLY LIABILITIES
Monthly mortgage payment	Current:\$ _____ Desired:\$ _____	Pay-Off?
Taxes and Insurance	<input type="checkbox"/> Include <input type="checkbox"/> Exclude from monthly pmt	Car Loan:
Property type: <input type="checkbox"/> Single-Family <input type="checkbox"/> Condo <input type="checkbox"/> 2-4 Unit <input type="checkbox"/> 5+ Units <input type="checkbox"/> Commercial		Credit Cards:
		Other:
SECTION 5: Planning Ahead – Help us understand your needs and priorities better		
How many years do you plan to own this new home or keep this mortgage? <input type="checkbox"/> Less than 3 Years <input type="checkbox"/> 3 to 7 Years <input type="checkbox"/> More than 7 Years		
How do you see your income changing while in your home during this period? <input type="checkbox"/> Increasing <input type="checkbox"/> Decreasing <input type="checkbox"/> Remaining the same		
Do you foresee incurring any new financial obligations in the next 5 years (i.e. new car, baby, college tuition, home remodeling). <input type="checkbox"/> Yes <input type="checkbox"/> No If YES, please tell us:		
How would you rate your mindset when dealing with your finances & investments <input type="checkbox"/> Conservative <input type="checkbox"/> Moderate <input type="checkbox"/> Aggressive		
SECTION 6: Getting to Know You – We are committed to developing a relationship with those we work with		
Your Birthday (Month/Year):	BORROWER:	CO-BORROWER:
Wedding Date (Month/Year)		
Name of Children/Ages		
Do you have the following trusted advisors in your life? (Check if Yes)	How likely are you to refer them to your family and friends? (Circle 1=Not Likely; 5=Very Likely)	Any additional Notes/Comments to help our research and planning?
Financial Planner	1 2 3 4 5	
Real Estate Agent	1 2 3 4 5	
Insurance Agent	1 2 3 4 5	
Tax Advisor	1 2 3 4 5	
Estate Planner	1 2 3 4 5	