



Mortgage Planning Questionnaire

Financing and acquiring real estate should be thought of as an integral part of your overall personal financial plan. We are dedicated to providing you with the information you need to make an informed decision. To assist us in selecting the most appropriate and cost effective mortgage for your individual needs, please complete the following questionnaire.

1. How would you like us to stay in contact with you?

- Email Mail Fax Home Phone Cell Phone

2. How soon are you thinking of buying or refinancing?

- Immediately 2-6 months 6-12 months >1 year

3. What is the best estimate for how long you might live in this home?

- 1-3 years 3-5 years 5-7 years 7-10 years 10 years +

4. How many years do you think you will have this loan?

- 6-12 months 1-3 years 3-5 years 7-10 years 10 years +

5. In how many years do you plan to retire? _____ years

6. Do you currently have any plans for major expenses in the next 12 months?

- | | |
|------------------|----------------------------|
| \$ _____ New Car | \$ _____ Home Improvements |
| \$ _____ College | \$ _____ Rental Properties |
| \$ _____ Health | \$ _____ Other: _____ |

7. Please check the following if they are priorities as it relates to your mortgage financing:

- Determine maximum purchase price and/or loan I can qualify for
- Determine purchase price and loan amount appropriate for my income and lifestyle
- Obtain a targeted monthly mortgage payment amount of \$ _____
- Purchase a home within a specific budget, down payment and closing costs
- Have ability to sell, pay down, pay off, or refinance home without penalty
- Maximize tax benefits
- Avoid mortgage insurance
- Qualify for new home prior to, or without sale of existing home
- Other: _____

8. Please check the following goals if they are a priority for you currently
- Improve monthly cash flow
 - Maximize education savings
 - Maximize retirement savings
 - Live comfortably on one income
 - Live comfortably on a fixed income
 - Other: _____
 - Tax Reduction Strategies
 - Create a comprehensive financial plan
 - Create a 6-12 month cash reserve account
 - Maximize investment contributions
 - Real Estate investment strategies
9. If you currently rent, please provide us with the name of your landlord and their contact information:
 Name: _____ Phone: _____
10. Would you like to establish an escrow account for property taxes and/or insurance as part of your new loan?
 Yes No, Thanks (Unless required)
11. Have you spoken with other lenders? Yes No
 If yes, which loan program did you like best so far?

12. I work closely with dedicated business partners. Please let me know if you would like referrals for any of the following:
 Real Estate Agent
 Attorney
 Estate Plan—Asset protection
 Insurance—Life/Auto/Home
 Financial Advisor
 Income Tax Preparation
13. Are you interested in buying real estate for investment purposes? Yes No, Thanks
14. What is the maximum total monthly housing payment you would be comfortable with?
 \$ _____
15. What are your biggest challenges right now with respect to money?
 Need to save more Too much spending
 Need to make more money Too much credit card debt
 I pay too much tax Other: _____
16. Please let us know who we can thank for referring you to us?
