



Agent: _____ Agent Email: _____ Agent Phone #: _____

Client # 1 Name: _____ Client #1 DOB: _____

Email: _____ Phone number: _____

Client # 2 Name: _____ Client #2 DOB: _____

Email: _____ Phone number: _____

Address: _____ State _____ Zip: _____

ESTIMATED VALUES

Fair Market Value of Home: _____

Current Balance: _____

Current Interest rate (APR: _____

Years remaining on current debt: _____

Mortgage Pymnt (w/taxes & ins.): _____

Net Monthly Income: _____

**Est. Monthly Expenses: _____

Liquid Savings: _____

ADDITIONAL LOANS

LOAN TYPE	CURRENT BAL	INT RATE	MONTHLY PMT
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_____	\$ _____	_____ %	\$ _____
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_____	\$ _____	_____ %	\$ _____
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_____	\$ _____	_____ %	\$ _____
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_____	\$ _____	_____ %	\$ _____
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This property would classify as?

- ☐ a Primary Residence
- ☐ a Secondary Residence
- ☐ an Investment Property

What is your current Credit Score? _____

How did you hear about us?

- ☐ Facebook
- ☐ Google
- ☐ Agent
- ☐ Other: _____

What is your housing status?

- ☐ Own a house
- ☐ Renting a house
- ☐ Living with family
- ☐ Other: _____

** Please include **ALL expenses** (groceries, MORTGAGE, Insurance, Utilities...et al)

*** You do not need to be exact but please be as accurate in your estimates as possible