



MORTGAGE PLANNING QUESTIONNAIRE

Loan Officer: _____

(Please fax back prior to appointment)

1.	What is your best estimate for how long you might keep this loan, or own/live in this home? <input type="checkbox"/> 1-3 years <input type="checkbox"/> 3-5 years <input type="checkbox"/> 7-10 years <input type="checkbox"/> 10-15+ years
2.	Do you currently have any plans for a major purchase in the next 12 months including a car, college, home improvements or rental properties? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, for what & how much money do you expect to need? _____ \$_____
3.	Of the following financial goals, which would you say is a top priority currently? (select all that apply) <input type="checkbox"/> Improve monthly cash flow <input type="checkbox"/> Live comfortably on one income <input type="checkbox"/> Maximize investment contributions <input type="checkbox"/> Maximize education savings <input type="checkbox"/> Create a 6-12 month cash reserve account <input type="checkbox"/> Create a comprehensive financial plan <input type="checkbox"/> Other: _____
4.	Which of the following is most important regarding your mortgage financing? (select all that apply) <input type="checkbox"/> Determine maximum purchase price and loan amount I can qualify for <input type="checkbox"/> Determine purchase price and loan amount appropriate for my income and lifestyle <input type="checkbox"/> Obtain a targeted monthly mortgage payment amount <input type="checkbox"/> Purchase a home within a specific budget, including down payment and closing costs <input type="checkbox"/> Have ability to sell, pay down, pay off, or refinance home without penalty <input type="checkbox"/> Maximize tax benefits <input type="checkbox"/> Avoid mortgage insurance <input type="checkbox"/> Qualify for new home prior to, or without sale of, existing home <input type="checkbox"/> Other: _____
5.	When do you expect your lifestyle to change? How? _____ _____ _____
6.	Would you like us to refer you to an experienced local realtor? <input type="checkbox"/> Yes <input type="checkbox"/> No Would you like us to refer you to an experienced financial planner? <input type="checkbox"/> Yes <input type="checkbox"/> No Would you like us to refer you to an experienced local attorney? <input type="checkbox"/> Yes <input type="checkbox"/> No
8.	In order to be fully prepared for your pre-approval, the following is a list of the documents I will need (<i>additional documents may be needed when you find/binder your new home</i>): <input type="checkbox"/> Recent pay stubs <input type="checkbox"/> 2 year's W2s <input type="checkbox"/> 2 year's tax returns if self-employed or derive more than 25% of income from commission, or if you own rental properties <input type="checkbox"/> All pages of most recent statement for savings, checking, investment, retirement accounts