

## Interview Questionnaire

Get the best loan, as simply and easily as possible, by making sure that the information used to structure, process and price your loan is *accurate* and *complete*. Our Mortgage Consultant's objective is to help collect this information during your *first* interview, but you can make the process painless.

*Fill in the worksheet and take notes to prepare for your chat with a Mortgage Consultant.*

<b>Name:</b>		
<b>Goals And Objectives:</b>	Why are you refinancing? What are you trying to accomplish?	
<b>Property Value</b> (estimate)		
<b>Estimated Loan Amount</b>	Plan ahead for reserves, title, service fees and closing costs	
<b>Loan Program Preference</b>	Fixed, ARM, Option Pay, Interest Only, Other	
<b>Mortgage Information</b>	<b>1<sup>st</sup> Mortgage</b>	<b>2<sup>nd</sup> Mortgage</b>
<b>Mortgage Balance</b>		
<b>Payment</b> (P&I)		
<b>Late Payments</b> (12 mo)		
<b>Lender</b>		
<b>Insurance and Taxes</b>		
<b>Loan Type / Term</b>		
<b>Interest Rate</b>		
<b>Prepayment Penalty</b>	No    Yes    years?	No    Yes    years?
<b>Date of Refi or Purch</b>		
<b>Notes</b>		

(Over)

Mortgage & Lending – Interview Questionnaire  
(Continued)

House Information		
<b>Years in the House</b>		
<b>Type of Property</b>		
<b>Notes</b>		
Income Information	Borrower	Co-Borrower
<b>Employer</b>		
<b>Position / Job Title</b>		
<b>Years with Company</b>		
<b>Years in Profession</b>		
<b>Gross Income / Month</b>		
<b>Notes</b>		
Credit Information		
<b>Credit Rating/FICO Score</b>		
<b>Total Credit Debt</b>		
<b>Bankruptcy</b>	No    Yes    when?	No    Yes    when?
<b>Foreclosure / NOD</b>	No    Yes    when?	No    Yes    when?
<b>Notes</b>		
Comments		

Additional information that might impact refinancing, property issues, title or unique conditions.

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*We are here to help! If you have ANY questions, are unclear about the type of information being requested, or are ready to see the types of loan programs we can offer you, please contact a Mortgage Consultant – toll-free - at ANY time.*

**Phone 1-888-457-1777      Fax 1-888-457-1666**

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