

**BORROWER**
**CO-BORROWER**

NAME:  NAME:

EMAIL:  EMAIL:

## ANNUAL MORTGAGE REVIEW

**What are your real estate goals over the next 5-10 years? Dreams for the next 20 years?**

**Do you anticipate any major changes in your financial picture in the next 5 years?**  
*(Ex. Buying a second home or investment property, home improvements, retirement, paying for education, caring for aging parents, etc.)*  Yes  No

**Have there been any significant changes in your employment or income over the last year?**  Yes  No

**Do you anticipate any changes in your employment or income in the next 2-5 years?**  Yes  No

**Do you have any new second mortgages?**  Yes Amount \$   No

**What is the approximate value of your home?**  **How long do you plan to live in this home?**

**Which of the following personal goals are most important to you?**  
*Please rank in order of importance to you (with 1 being the most important and 5 being the least).*

Building your net worth/achieving financial freedom

Having your mortgage paid off when you retire (*projected retirement date:* )

Achieving liquidity (*having access to a slush fund in an emergency, investing in the stock market, etc.*)

Moving into a larger home within  years

Maximizing current and future tax deductions

Saving money to send your kids to college

Other:

**What would you like your mortgage to accomplish right now?**

Lower monthly payment

Eliminating other debt (credit cards, student loans, etc.)

Using equity buildup to develop a cash reserve or for investment purposes

Maximize tax benefits

Pay off your loan as soon as possible

Other:

**What needs do you have that I can help you meet?**

**How would you describe your existing financial philosophy? Is it**  conservative  moderate or  aggressive?

**On a scale of 1-10 (10 being best), please rate your existing:**

Financial Planner  Insurance Agent  CPA  Estate Planning Professional  Attorney

**Do you have a will or living trust to protect your family's assets in the event that something happens to you?**  Yes  No

**SUBMIT FORM**



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