

**KNOW YOUR CLIENT INFORMATION**

What are your goals with regards to this mortgage?

- Purchase Price Range from \$\_\_\_\_\_ to \$\_\_\_\_\_
- Obtain a lower rate: Current Rate \_\_\_\_\_%       Down payment Available \$\_\_\_\_\_
- Consolidate Debt: Amount: \$\_\_\_\_\_       Obtain a lower payment: Current Payment: \$\_\_\_\_\_
- Renovations: Amount: \$\_\_\_\_\_      Type of Renovations: \_\_\_\_\_
- Other: Explain: \_\_\_\_\_

What is the amount of the mortgage payment that you believe would fit your current lifestyle?

From \$\_\_\_\_\_ to \$\_\_\_\_\_ per month

What interest rate range do you expect to obtain?      From \_\_\_\_\_% to \_\_\_\_\_%

Do you plan on moving in the next 5 years? If yes, when? \_\_\_\_\_

Do you believe your current home will meet your family’s needs over the next five years? If not why?

- Yes       No \_\_\_\_\_

Do you intend to make lump sum payment or payments on your mortgage to pay it off faster?       Yes       No

Which is most important to you?

- Debt repayment: Paying your mortgage off as soon as possible?
- Cash Flow: Having a low or the lowest payment possible?

Which is most important to you?

- Mortgage Payment: Having a mortgage payment that fits your cash flow?
- Interest Rate: Having a low or the lowest interest rate possible?

When it comes to your mortgage payment, would you say that you would like a mortgage payment that:

- Stays the same month to month?
- Might increase or decrease if there is the potential to save money?

If given the option to have a variable interest rate that is lower than a fixed interest rate, would you:

- Be willing to watch interest rates on a monthly basis to ensure that your mortgage has the best rate possible?
- Prefer to have a fixed interest rate that did not fluctuate and did not require regular attention?

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date