



Management of your mortgage is essential to your financial success

For this reason, I have an arrangement in place whereby a mortgage specialist will review your situation at no-charge or obligation.

Please complete the following information and return it to our office. You can expect a call from Jon Strickland at Mortgage Intelligence shortly.

Name: _____

Current Address: _____

Phone #: _____ Convenient time to call _____

Alternate Phone #: _____ Convenient time to call _____

Financial Planner Name: _____

Mortgage Check-up Questionnaire: *check the appropriate mortgage information below:*

- | | | |
|---|---|---|
| <input type="checkbox"/> Pre-approval | <input type="checkbox"/> Purchase | <input type="checkbox"/> First-time buyer |
| <input type="checkbox"/> Repeat Home buyer | <input type="checkbox"/> Switch | <input type="checkbox"/> Early Renewal |
| <input type="checkbox"/> Refinance to consolidate | <input type="checkbox"/> Refinance to Renovate | <input type="checkbox"/> Refinance to Invest |
| <input type="checkbox"/> 1 st Mortgage | <input type="checkbox"/> 2 nd Mortgage | <input type="checkbox"/> Secured Line of Credit |
| <input type="checkbox"/> Owner occupied | <input type="checkbox"/> Rental | |

If switch, early renewal, repeat home buyer, refinance or just general information on your current mortgage, please complete below

Current mortgage lender: _____

Approx. mortgage balance: _____

Renewal date: m/d/yr: _____ / _____ / _____

Current interest rate: _____

Current mortgage payment: _____

mth wk biwk bimth

If a refinance for any reason, please complete below:

Additional amount required: _____

Original purchase date: _____

Original purchase price: _____

Improvements since purchase: _____



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