



## Time For Your Mortgage Check-Up

Please fax completed form to (972)555-5555

**BORROWER:**

**CO-BORROWER**

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

Social Security #: \_\_\_\_\_

SS#: \_\_\_\_\_

Age: \_\_\_\_\_ Years in school: \_\_\_\_\_

Age: \_\_\_\_\_ Years in School: \_\_\_\_\_

Home Phone #: \_\_\_\_\_

Home Phone #: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_

Please check any of the following which may benefit you if you refinance your current mortgage:

\_\_\_\_\_ Children's Education fund/needs

\_\_\_\_\_ Decrease fixed monthly expenses for retirement

\_\_\_\_\_ Increase investment account balances

\_\_\_\_\_ Buyout of former spouse

\_\_\_\_\_ Reduce overall cost of your loan

How long do you plan on staying in your home?

\_\_\_\_\_ <1 year \_\_\_\_\_ 1-3 years \_\_\_\_\_ 5-7 years \_\_\_\_\_ over 7 years

What type of loan do you currently have?

\_\_\_\_\_ Fixed \_\_\_\_\_ Conventional \_\_\_\_\_ Non-conforming \_\_\_\_\_ Other

What is the value of your current home? \_\_\_\_\_

What is the approximate loan balance? \_\_\_\_\_

Current interest rate \_\_\_\_\_ Start Date of Loan Term \_\_\_\_\_

Total Monthly Loan Payment \_\_\_\_\_

What are your yearly taxes? \_\_\_\_\_ Included in your mo. Payment? \_\_Y \_\_N

What is your yearly homeowners insurance? \_\_\_\_\_ \_\_Y \_\_N

Do you have a second lien?

If yes, what is approximate loan balance? \_\_\_\_\_

How much is your monthly payment? \_\_\_\_\_

Based upon the above information, we will evaluate whether or not your current loan is structured to maximize your overall financial goals or if your current interest rate is saving you money at this time. I/We the undersigned hereby authorize me to order a preliminary credit report for evaluation purposes of the Mortgage Checkup.

Borrower's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Co-Borrower's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Jim McMahan**

Founder of Certified Scripts for Success