



Client Profile

SYNOVUS

Date: _____ Realtor: _____
Contact: _____

I. Contact Information

Name(s): _____

Name(s): _____

Address	City, State, Zip
Address	City, State, Zip

Work	Home	Cell
Work	Home	Cell
Fax	Email	
Fax	Email	

Preferred Contact Method				Time	
Work	Home	Cell	Email	AM	PM
Work	Home	Cell	Email	AM	PM

Housing Details

Real Estate Interest	Time Line
Sell Buy Rent Lease Purchase	Today 30-90 Days 90-120 Days 6- 12 Months Over a Year
Type of Property	Price Range
SF 2-4 Units Condo/Townhome Apartment Land Commercial	\$ \$
Primary Residence Second Home Rental Investment Rehab	Age of Home: New Construction
Location/Area	Preferred Style
City: Zip Code: School District:	
Stories: # Bedrooms: Garage: # Baths: Basement: # of Cars: Fireplace Fenced Yard	Other Amenities and Comments:

Disclosure: I agree to: Provide equal professional service without regard to the race, color, religion, sex, handicap, familial status, or national origin of any prospective client, customer, or of the residents of any community.

Mortgage Planner(s)

Cathy McDaniel - Cell/Text 404-550-0775, Email: cathyecdaniel@synovusmortgage.com
Gina Lemelin - Cell/Text 770-540-6471, Email: ginalemelin@synovusmortgage.com

Planning for Your Home

SYNOVUS

Seller/Buyer Name:
Contact Number:
Email:

Realtor:
Contact Number:
Email:

Today's Date:

Would you like to talk with a Mortgage Planner today?
Yes No

Are you?

Paying Cash
Need a Mortgage Refinancing
Need a Rehab Loan Home Equity Loan
Downpayment Assistance Program
Yes No
Name of Program:

Is your downpayment a gift?
Amount? \$

Do you have a home to sell or rent?
Yes No
If yes, do you have a contract?

If you rent, when will your rent contract expire?

Have you recently ordered a copy of your Credit Report?
Yes No

Have you talked with a Mortgage Planner?
Yes No

Have you completed a loan application?
Yes No Date:

Have you applied online?
Yes No Date:

Desired Mortgage Payment Range: \$

Will you be using a co-signer?

Property Address:

Property Description: Age/Condition

Purchase Price: \$
Single Family 2-4 Unit Condo Townhome
Is the home served by a well and/or septic
tank? Yes No Well Septic Tank
Is the seller paying closing cost? Yes No
If yes, amount \$

HOA/Condo Fees: \$ Monthly/Annual
Does the property need repairs? Yes No
What type of repairs?
Is there a home warranty? Yes No
Any recent inspections on the property? Yes No
Details:

Mortgage Company

Pre-qualification DU Approved

Mortgage Company Name

Loan Officer:
Phone #:
Email:

Loan Type

FHA VA Conventional USDA NSP

Closing Date:

Mortgage Planner

Cathy McDaniel - Cell/Text 404-550-0775
Email: Cathymcdaniel@synovusmortgage.com

Mortgage Planner

Gina Lemelin - Cell/Text 770-540-6471
Email: ginalemelin@synovusmortgage.com

**SYNOVUS****Home Owner(s):****Contact Number:****Contact Number:****Email:****Email:****Realtor:****Phone:****Email:****Existing Mortgage Company**

First Mortgage Company

Pay Off: \$

Second Mortgage Company

Pay Off: \$

Have you talked with your current mortgage company? Yes No

Date: Comments

Have you received a previous loan modification?
Yes No Date:

If yes, explain details:

Have you received a workout offer from your lender? Yes No Date:

Details:

Are you working with a Housing Counselor?
Yes NoName:
Contact:Have you talked with a Bankruptcy attorney?
Yes No**Refinance**

Estimated Property Value: \$

Has there been an appraisal, BPO CMA or an AVM preformed?

Yes No If yes, date:

Do you have a copy? Yes No

Any there liens on property other than the mortgage(s)? Yes No

If yes, explain:

Are the property taxes up-to-date? Yes No

Annual taxes City/County: \$

Is the Hazard Insurance up-to-date? Yes No

If no, explain:

Is flood insurance required? Yes No

Does the home need any repairs, corrections or updating? Yes
No

If yes, please explain"

Is your home served by a well or septic tank?

What results are you hoping to achieve today?

Equal Housing Lender Disclosure - We do business in accordance with the Federal Fair Lending Laws UNDER THE FEDERAL HOUSING ACT, IT IS ILLEGAL, ON THE BASIS OF RACE, COLOR, NATIONAL ORIGIN, RELIGION, SEX, HANDICAP, OR FAMILIAL STATUS (HAVING CHILDREN UNDER THE AGE OF 18) TO: Deny a loan for the purpose of purchasing, constructing, improving, repairing or maintaining a dwelling, or deny any loan secured by a dwelling; or Discrimination in fixing the amount, interest rate, duration, application procedures or other terms or conditions of such loan, or in appraising property.

Mortgage Planner - Cathy McDaniel - Cell/Text 404-550-0775 Email: Cathymcdaniel@synovusmortgage.com**Mortgage Planner** Gina Lemelin - Cell/Text 770-540-6471 Email: ginalemelin@synovusmortgage.com

Notes: