

Interview:

FINANCIAL BLUEPRINT

Referred By:

Date:

Borrower Information	
Borrower Name:	Co-Borrower Name:
Email:	Email:
Address: Years: <input type="checkbox"/> Own <input type="checkbox"/> Rent	Address: Years: <input type="checkbox"/> Own <input type="checkbox"/> Rent
Previous Address: Years: <input type="checkbox"/> Own <input type="checkbox"/> Rent	Previous Address: Years: <input type="checkbox"/> Own <input type="checkbox"/> Rent
Home # Work # Fax # Cell #	Home # Work # Fax # Cell #
SSN#	SSN#
DOB	DOB
Years School: <input type="checkbox"/> 12 <input type="checkbox"/> 16 <input type="checkbox"/> Other	Years School: <input type="checkbox"/> 12 <input type="checkbox"/> 16 <input type="checkbox"/> Other
#/Age of dependents	#/Age of dependents
Marital Status: <input type="checkbox"/> Married (registered domestic partners) <input type="checkbox"/> Unmarried (single, divorced, widowed) <input type="checkbox"/> Separated	Marital Status: <input type="checkbox"/> Married (registered domestic partners) <input type="checkbox"/> Unmarried (single, divorced, widowed) <input type="checkbox"/> Separated
US Citizen: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Permanent Alien <input type="checkbox"/> Non-Citizen <input type="checkbox"/> Non-Permanent Alien	US Citizen: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Permanent Alien <input type="checkbox"/> Non-Citizen <input type="checkbox"/> Non-Permanent Alien
M/F: <input type="checkbox"/> Male <input type="checkbox"/> Female	M/F: <input type="checkbox"/> Male <input type="checkbox"/> Female
New Property Info	
New Property Address: Type: <input type="checkbox"/> SFR <input type="checkbox"/> Condo <input type="checkbox"/> Townhome	
New Property Price \$:	
New Property Taxes:	
Initial Questions	Financial Goals
Amt of Down Payment \$ Amt of Earnest Money \$ Do you have a house to sell? Realtor Name: Realtor Phone # Realtor Email:	Closing Date on new home # Years in New Home: Purchase Price Comfort Zone \$ Monthly Payment Comfort Zone \$ Cash to Close Comfort Zone\$
House to Sell Proceeds	Current House Payment
Sale Price \$	Current Rent Pymt:
1st Mtg Payoff:	Current P&I (1st mtg)
2nd Mtg Payoff:	Current P&I (2nd mtg)
Other Debts:	Current RE Taxes:
RE Comm: %	Current Hazard Insurance:
Seller RE Tax Credit to Buyer:	Current Mortgage Insurance:
Seller Closing Cost:	Current Association Dues:
Net Proceeds/Loss:	Current Total Payment:

FINANCIAL BLUEPRINT

Income Calculation					
Borrower			Co-Borrower		
Employer:			Employer:		
Position:			Position:		
Profession:			Profession:		
Time on Job:			Time on Job:		
Base: \$	OT: \$		Base: \$	OT: \$	
Bonus:\$	Commission: \$		Bonus:\$	Commission: \$	
# of Hours:	Hourly Wage: \$		# of Hours:	Hourly Wage: \$	
+Alimony: \$	+Child Support: \$		+Alimony: \$	+Child Support: \$	
- Alimony \$	- Child Support \$		- Alimony \$	- Child Support \$	
Other: \$			Other: \$		
2nd Job			2nd Job		
Profession:			Profession:		
To:			To:		
From:			From:		
Phone #			Phone #		
Monthly Income: \$			Monthly Income: \$		
Previous Employer:			Previous Employer:		
Profession:			Profession:		
To:			To:		
From:			From:		
Phone #			Phone #		
Monthly Income: \$			Monthly Income: \$		
Notes on Income:					
Asset					
Borrower 1			Borrower 2		
Account Type	Amount \$	Account	Account Type	Amount \$	Account
<input type="checkbox"/> Checking #1			<input type="checkbox"/> Checking #1		
<input type="checkbox"/> Checking # 2			<input type="checkbox"/> Checking # 2		
<input type="checkbox"/> Savings #1			<input type="checkbox"/> Savings #1		
<input type="checkbox"/> Savings #2			<input type="checkbox"/> Savings #2		
<input type="checkbox"/> Money Market			<input type="checkbox"/> Money Market		
<input type="checkbox"/> Cash On Hand			<input type="checkbox"/> Cash On Hand		
<input type="checkbox"/> Gift			<input type="checkbox"/> Gift		
<input type="checkbox"/> Other			<input type="checkbox"/> Other		
Liquidating Stocks					
<input type="checkbox"/> 401K			<input type="checkbox"/> 401K		
<input type="checkbox"/> IRA			<input type="checkbox"/> IRA		
<input type="checkbox"/> Misc.			<input type="checkbox"/> Misc.		
Total Assets:			Total Assets:		
Misc. Notes					