# Hanson Planning Group

*1720 S. Bellaire Street #700 Denver, CO 80222*
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**Name:**_____

Date: _____

## Personalized Mortgage Planning Questionnaire

Selecting the wrong mortgage program can cost you thousands of dollars and no single loan program is appropriate for every person. To assist us in selecting the most appropriate and cost effective mortgage instrument for your individual needs, please complete the questions below and fax back to:

**Nicole or Matt @ 303-300-8637 before your consultation**.

1. Please rate the following priorities in your order of personal importance 1 thru 4 (1 = most important )

____ Cash Flow ____ Debt Management

____ Asset Accumulation ____ Retirement Planning

2. What is the maximum total monthly payment you wish to spend?

3. How long do you anticipate living in this home?

4. If you have been looking at homes what is your price range?

5. What is the Maximum Dollar amount you can bring to the closing of your loan Including Down Payment and Closing Costs?

6. In how many years do you plan to retire?

7. Do you have a retirement plan at work?

8. What do you think will be the amount you will need in assets to retire without having to work?

9. If you have children do you have an asset plan established to help them pay for college?

10. What is the approximate % of annual pay increase you receive or anticipate receiving

11. Do you currently plan any major purchases in the next 12 months? (i.e.: Car, Home Improvements)

12. Are you interested in buying real estate for investment purposes? YES NO

As a second home? YES NO

13. To the best of your knowledge how would you rate your credit?

Poor Fair Good Excellent

14. On a scale from 1-10 (10 being best) please rate the following or mark N/A if you do not have a relationship established

a. Are you satisfied with your CPA? _____

b. Are you satisfied with your financial planner? _____

c. Are you satisfied with your current estate plan? _____

15. Do you have life insurance? ( Yes / No )

If Yes, how much _____

Is it Term or Whole Life? _____

Do you have Disability insurance? ( Yes / No )

16. If you have talked to other lenders which program(s) do you like best?

17. Which statement best describes your knowledge of mortgage loan programs.

____ I / We would like to learn ____ I/ We have some knowledge

____ I / We are very knowledgeable

18. Financially, do you consider yourself?

a. Conservative

b. Somewhat Conservative

c. Aggressive