

# Hanson Planning Group

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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. What is the approximate value of your home?

5. What is the Maximum Dollar amount you can bring to the closing of your loan?

6. Do you anticipate rolling the closings costs into your new loan amount?

7. If anticipating a cash out refinance, how much cash out do you hope to receive?

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

9. Do you have a retirement plan at work?

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

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

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

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

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

As a second home? YES NO

15. To the best of your knowledge how would you rate your credit? Poor Fair Good Excellent

Would you like to receive and review a copy of your credit report?

16. 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? \_\_\_\_\_

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

If Yes, how much \_\_\_\_\_

Is it Term or Whole Life? \_\_\_\_\_

Do you have Disability insurance? ( Yes / No )

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

19. 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

20. Financially, do you consider yourself?

a. Conservative

b. Somewhat Conservative

c. Aggressive