



Contact Info

Date: ____ / ____ / ____

Name / Age

Email

Primary Phone

Current status (circle one)

Renter, Homeowner, Senior, or Investor

Current Monthly Expenses

Rent or Mortgage (circle one)

\$

Total Expenses credit (card/auto loans/student loans etc.)

Other Misc. Expenses (utilites/insurance/food/clothing etc)

Total Monthly Expenses

\$

Homeowner-Primary Residence Information

Original Purchase Date

Original Purchase Price

\$

Total Investment Amount

\$

Present Market Value (Approximate)

\$

Average Interest Rate

%

Original Mortgage Term

Yrs.

Current Mortgage Balance

\$

Current Mortgage Payment

\$

Approximate Rental Value

\$

Liquid Assets

Table with 4 columns: Source, Principal Balance, Rate of Return, Monthly Savings Amt.

Real Estate Owned

Table with 5 columns: Address, Current Market Value, Mortgage Balance, Monthly Payment, Monthly Income Amt.

