



Agent: Genyatto Brown Agent Email: genyatto@gmail.com Agent Phone #: 919-599-3512

Client # 1 Name: _____ Client #1 DOB: _____
 Email: _____ Phone number: _____

Client # 2 Name: _____ Client #2 DOB: _____
 Email: _____ Phone number: _____

Address: _____ City: _____ State: _____ Zip: _____

PROPERTY INFORMATION/VALUES

Fair Market Value of Property: \$ _____
 Current Balance: \$ _____
 Current Interest rate (APR): _____ %
 Yrs remaining on current mortgage: _____
 Mortgage Pymt. (w/taxes & ins.): \$ _____

This Property is Classified as? ("Y/N")
 a Primary Residence _____
 a Secondary Residence _____
 an Investment Property _____

INCOME & EXPENSES

Net Household Monthly Income: \$ _____
 **Est. Monthly Expenses: \$ _____
 Liquid Savings: \$ _____
 What is Your Current Credit Score? _____

****Please include ALL EXPENSES (MORTGAGE, Cars, Credit Cards, Utilities, Groceries, Dining Out, Gas, Child Care, Student Loans, ETC.)**

*****You do not need to be exact, BUT please be as accurate in your estimating as possible**

ADDITIONAL DEBTS/LOANS

<u>Loan Type</u>	<u>Current Bal</u>	<u>Interest Rate</u>	<u>Monthly Payment</u>
_____	\$ _____	_____ %	\$ _____
_____	\$ _____	_____ %	\$ _____
_____	\$ _____	_____ %	\$ _____
_____	\$ _____	_____ %	\$ _____
_____	\$ _____	_____ %	\$ _____

NOTES/Additional loans: