



Agent: Genyatto Brown Agent Email: gbrown@IntegralFinancial.net 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: