



## Analysis Appointment

Name - \_\_\_\_\_ Phone # - \_\_\_\_\_

Address - \_\_\_\_\_ Email - \_\_\_\_\_

### Mortgages

Lender Name	Mortgage Start Date	Mortgage Term	Monthly Payment*	Extra Principal Payment	Interest Rate	Escrow Payment	Mortgage Insurance Payment	Current Mortgage Balance	Original Mortgage Amount

*\*Including Principal, Interest, Escrows, PMI/Mortgage Insurance etc.*

### Loans

Account Name*	Loan Start Date	Loan Term	Monthly Payment	Extra Principal Payment	Interest Rate	Current Loan Balance	Original Loan Amount

*\*Auto Loans, Student Loans, Personal Loans, Business Loans*

### Revolving Credit

Type of Credit*	Current Balance	Minimum Payment	Extra Principal Payment	Interest Rate	Credit Limit

*\*LOC- Line of Credit, Credit Card, HELOC – Home Equity Line of Credit*

### Average Household Net Income

Income Source*	Payment Frequency*	Average Net Income Per Paycheck

*\*Every Week, Every Other Week, Once a Month, Twice a Month, Every Three Months, Twice a Year, Once a Year*

**Monthly Expenses (All Bills--Food, Gas, Electric etc...)-** \_\_\_\_\_

**AND / OR**

**Monthly Discretionary Income (left after Bills are paid)-** \_\_\_\_\_