

COMPLIMENTARY MORTGAGE REVIEW



CUSTOMER INFORMATION

Name: _____

Phone: _____

Email: _____

Address: _____

Yes No Is customer eligible for the Premier Plus Rewards program?

WHAT'S YOUR GOAL (CHECK ALL THAT APPLY)

Lower Your Payment

Lower Your Rate

Consolidate Debt

Get Additional Cash

Desired Term

10yr

15yr

20yr

25yr

30yr

CURRENT MORTGAGE INFORMATION

Approximate Value: _____ Balance of Current Mortgage: _____

Rate: _____ Term: _____ Adjustable Fixed Reverse Mortgage

Current Payment: _____

Insurance and taxes included? Yes No **If yes**, please provide the amount of taxes and insurance: _____

Anything else we should know?

To better serve you, please provide us with a copy of your current mortgage statement.