

Refinance Supplement

Property

What property do you want to refinance?

Primary: _____ Second Home: _____ Investment: _____

When did you purchase the property? _____

What was the purchase price? _____

Current Mortgage

What are the terms of your current mortgage?

rate: _____ term: _____ (such as: 30 yr fix, 7/1 ARM, etc)

Fixed: _____ ARM: _____

When does it begin to adjust?: _____

Does your current mortgage have a pre-payment penalty?

yes: ____ no: ____ don't know: ____

Purpose

What are your goals with the refinance?

lower rate: _____

cash out: _____

how much: \$ _____

purpose: _____ (remodel, consolidate debt, etc)

other: _____
