

Annual Mortgage Checkup

Name(s) _____

Home Phone _____ Mobile _____ Office _____

Email _____ Email _____

1. Have there been any changes in your financial situation since your last home loans with us?
 Yes no if yes, what?
2. Have you obtained a home equity line of credit since we structured your most recent mortgage?
 Yes no if yes, in what amount?
3. Do you anticipate any changes in the next 1-2 years?
 Yes no if yes, how?
4. What do you feel your home is worth at the present time?
5. What real estate and lending needs and goals do you have in the next 1-2 years?
6. What is your best estimate for how long you might have this loan or live in this home?
 1-3 years 3-5 years 7-10 years 10-15+ years
7. Do you currently plan on any major purchases in the next 1-2 years including car, home improvements or education?
 Yes no if yes, what and when?
8. Have there been any changes in your income or monthly cash-flow since your last home loan with us?
 Yes no if yes, what and how?
9. Do you anticipate any changes in the next 1-2 years?
 Yes no if yes, how?
10. On a scale of 1-10 (10 being best), please rate your current level of satisfaction in the following areas:
_____ Income Tax Preparation _____ Financial Advisor/Investment Strategy _____ Estate Plan

Kameren will be contacting you to arrange a time for us to meet so that we can discuss your any changes in your goals and make any necessary changes needed. I am looking forward to the opportunity meet with you again to discuss your goals and review your successes. I appreciate you and value your business!

Janet French, CMP & Kurtis Kooiman, CMPS
Certified Mortgage Planners
Silverstar Finance, Inc.

Phone 714.892.1002
Fax 714.892.1092
Team@SilverstarFinance.com
SilverstarFinance.com