



**Analysis Appointment**

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

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

**Mortgages**

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

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

**Loans**

Account Name*	Loan Start Date	Loan Term	Monthly Payment	Extra Principle 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 Principle 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)- \_\_\_\_\_**