

NEW HOME AFFORDABILITY ANALYSIS



LEVEL FOUR[®]
Financial
A DIVISION OF
CARR, RIGGS & INGRAM CAPITAL, LLC

Prepared For: _____

Date: _____

INCOME & SAVINGS

Annual Income before Tax	\$
Sinking Fund for down payment?	Yes No
Average Annual Savings towards Purchase	\$
Years until Purchase	

PURCHASE BUDGET

Purchase Budget	\$
Target Mortgage	\$
Target Monthly Payment	\$
Long Term	30-yr Fixed 30-yr fixed FHA 30-yr fixed VA 30-yr fixed USDA 20-yr fixed 15-yr fixed
Target Interest Rate	%
Location (City, State)	

DOWN PAYMENT

Down Payment <small>(20% or more to avoid Prime Mortgage Insurance)</small>	\$
Down Payment Amount	\$
Current Sinking Fund Balance	\$

HOUSING EXPENSES

Property Tax Rate		Yearly Property Taxes	\$
Home Owner's Insurance	\$	HOA Fees	\$
Other housing expenses <small>(Utilities, repairs, etc.)</small>			\$
			\$
			\$

ADDITIONAL INFORMATION

Selling existing property?	Yes No
Value of existing property	\$
Existing debt for property	\$

RECOMMENDED NEXT STEPS

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