

Reverse Mortgage Questionnaire: Initial Interview

Date:

Lead Source:

Borrower:

Age: Married?

Phone number:

Email:

Best way to communicate?

Best time to communicate?

Co-Borrower:

Age:

Non-Borrowing Spouse:

Resides with borrower?

Primary Residence address:

Mailing address:

Type of property?

What attracted about a reverse mortgage that prompted you to inquire?

Of the following objectives which one is closest to what you are seeking in a reverse mortgage?

1. The reduction or elimination of my current mortgage payment? (Although please understand that you will always be responsible for home expenses such as real estate taxes, homeowner's insurance and standard property maintenance)
2. Is your current mortgage in forbearance?
3. Paying off debts, including your mortgage if you have one, and having a steady monthly income?
4. Having "ready cash" available to use for any future purpose and then decide if I want to pay it back or allow my equity to make the payment?
5. Others?

What are your financial goals for the next 10 years?

What questions do you have for John prior to providing your information and seeing about eligibility?

Do you have a financial advisor?

If you decide to obtain further information about which reverse mortgage option best suits your needs, we suggest that a family member or other trusted advisor be included in the process. Do you have someone in mind?

Name(s)

Relationship:

Contact Info:

If you decide to take the next step and allow John Murphy to review your ability to borrow are you willing to voluntarily:

1. Have a free credit report obtained?
2. Provide a current mortgage statement?
3. Provide information and documentation of your income?
 - a. What would be the easiest way for you to deliver the items to John?
 - i. I have a scanner and can upload items to John's secure software program
 - ii. I would have copies made then use FEDEX or UPS
 - iii. I would need help making copies and with delivery

How would you like to provide the information we need to access your options?

1. Use John's secure software program and complete your information with your computer?
2. Have a phone interview with John while he completes your information?
3. Have a face-to-face meeting with John at his Temecula office?