



ANNUAL BORROWER FINANCIAL REVIEW

Happy Mortgage Anniversary! As a valued client of Company Name, this brief survey allows for us to stay up to date on your real estate and financial goals to help ensure you're on the right track or so we can provide guidance in areas we see opportunities for improvement.

• Name *First Last

• Have there been any significant changes in your employment or income in the last 12 months, such as a new job, pay raise, loss of a job, etc.? Do you expect changes in the near future? Please share below:

• Have you taken on any new debt since we last spoke? Have you paid off any existing debt in the last 12 months? If yes, please share details below:

• Have there been any significant changes in your savings, investments, or other asset balances in the last 12 months, or do you expect any in the near future? If yes, please share below:



- How is your family? Have there been any changes in the last 12 months, such as a new addition or a child moving on to college? Do you anticipate any in the near future? Please share below:

- How long do you see yourself in this house?
1-3 years 4-6 years 7-10 years 10+ years

- Ideally, how soon would you like the option to have your house paid off?
5 years or less 6-10 years 11-15 years More than 15 Years Never

- What are your real estate goals and dreams in the next 1-10 years? Examples might include purchasing investment property, buying a vacation home, moving up or moving down, or major home improvements. Please share below:

On a scale of 1-5, with 5 being the best, how would you rate your relationship with others helping you make important financial decisions? We call this your Wealth Team. (If no relationship exists, select N/A)

	1	2	3	4	5	N/A
Financial Investment Advisor	1	2	3	4	5	-
Real Estate Advisor	1	2	3	4	5	-
Insurance Advisor	1	2	3	4	5	-
Tax Advisor	1	2	3	4	5	-
Estate Planning Attorney	1	2	3	4	5	-





- Are there any current needs, questions, or important topics you'd like to make sure we discuss when we schedule our Mortgage Fitness Check-Up? These may include things like tips for paying off debt faster, strategies to increase savings, or introductions to other trusted financial professionals we know. Please share below:

