**Refinance Questioner**  Date \_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Co Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. **What is the purpose of the refinance? What is your goal?**
   1. Rate/Term
   2. Cash-out REFI
   3. Lower monthly payment
   4. Consolidate debt
   5. Get rid of mortgage insurance
   6. Get rid of a 2nd
   7. Change from ARM to Fixed
2. **Current Mortgage Loan:**
   1. What is your current rate
   2. Fixed or ARM
   3. What is your outstanding principal balance
   4. Are taxes and insurance impounded
   5. What you like closing costs to be rolled into the loan
   6. Do you have 2nd mortgage
3. **Property Information:**
   1. Property address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Property type: SFR / Condo / PUD / TIC
   3. Primary / Investment / Second home
   4. How much is the home worth?
   5. Do you own any other properties?
   6. Are there any HOA dues?
4. **Borrower:**
   1. What is your credit score?
   2. Any BK’s, Short Sale, Foreclosure
   3. Currently working: W-2 or Self Employed
   4. Are you obligated to pay any child support or alimony?