



Cornerstone[®]
HOME LENDING, INC.



ANNUAL MORTGAGE REVIEW

| Borrower | | Co-Borrower | |
|--|--|--|--|
| Name | | Name | |
| Email | | Email | |
| Annual Mortgage Review | | | |
| What are your real estate goals over the next 5-10 years? Dreams for the next 20 years? | | | |
| Do you anticipate any major changes in your financial picture in the next 5 years? (Ex. Buying a second home or investment property, home improvements, retirement, paying for education, caring for aging parents, etc.) | | | |
| Have there been any significant changes in your employment or income over the last year? Yes No | | | |
| Do you anticipate any changes in your employment or income in the next 2-5 years? Yes No | | | |
| Do you have any new second mortgages? Yes Amount \$ No | | | |
| What is the approximate value of your home? \$ | | How long do you plan to live in this home? | |
| Which of the following personal goals are most important to you? Please rank in order of importance to you (with 1 being the most important and 5 being the least). | | | |
| <input type="checkbox"/> Building your net worth/achieving financial freedom | | | |
| <input type="checkbox"/> Having your mortgage paid off when you retire (projected retirement date: _____) | | | |
| <input type="checkbox"/> Achieving liquidity (having access to a slush fund in an emergency, investing in the stock market, etc.) | | | |
| <input type="checkbox"/> Moving into a larger home within ___ years | | | |
| <input type="checkbox"/> Maximizing current and future tax deductions | | | |
| <input type="checkbox"/> Saving money to send your kids to college | | | |
| <input type="checkbox"/> Other: _____ | | | |
| What would you like your mortgage to accomplish right now? | | | |
| <input type="checkbox"/> Lower monthly payment | | | |
| <input type="checkbox"/> Eliminating other debt (credit cards, student loans, etc.) | | | |
| <input type="checkbox"/> Using equity buildup to develop a cash reserve or for investment purposes | | | |
| <input type="checkbox"/> Maximize tax benefits | | | |
| <input type="checkbox"/> Pay off your loan as soon as possible | | | |
| <input type="checkbox"/> Other: _____ | | | |
| What needs do you have that I can help you meet? | | | |
| How would you describe your existing financial philosophy? Is it conservative moderate or aggressive? | | | |
| On a scale of 1-10 (10 being best), please rate your existing: | | | |
| <input type="checkbox"/> Financial Planner <input type="checkbox"/> Insurance Agent <input type="checkbox"/> CPA <input type="checkbox"/> Estate Planning Professional <input type="checkbox"/> Attorney | | | |
| Do you have a will or living trust to protect your family's assets in the event that something happens to you? Yes No | | | |



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