

Initial Client Questionnaire

| Name(s): | | | | |
|---|--------------------------|--------------|----------|--------------|
| Day Phone: | g Phone: | | | |
| Cell Phone: | | | | |
| Current Address: | | | | |
| Email: | | | | |
| How long have you been at your present address? | | year(s) | | month(s) |
| When does your present lease expire (if renting)? | | | | |
| Have you ever owned a house before? | | yes | no | |
| When do you have to move? | | | | |
| Why are you moving? | | | | |
| Do you currently rent or own? | | rent | own | |
| How much is your current rent / mortgage? | | | | |
| What does it include? | | | | |
| What is the maximum monthly payment you could your new home? | l afford towards | | | |
| What is your combined gross household income (before any deductions)? | | Per Month | | Per Year |
| How much have you saved up towards the purcha | ase of your new home? | | | |
| If no down payment, do you have anything else of value? | | yes | no | |
| How is your credit? | | good | bad | don't know |
| What is your credit score now (if known)? | | | | |
| Have you ever been through a: | (check all that applies) | bankruptcy _ | foreclos | ure proposal |
| What part of town are you looking to own in? | | | | |
| How many bedrooms/bathrooms do you need? | | bedroor | ms | bathrooms |
| How many people will be living in your home? | | adults | | teens |
| | | children | | pets |
| What else may be important to you in your home? (For example: garage, deck, etc.) | | | | |

Privacy Notice, Information collection, Use and Sharing Disclaimer – This notice discloses the privacy practices for Concord Capital Partners Inc. and affiliates. This privacy notice applies solely to the information collected by this website and is kept confidential; as we are the sole users of information collected. We only have access to the information that you voluntarily give us via email and/or other direct contact from you. Your information will not be provided to a third party unless authorized to do so.