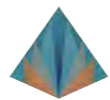




## Stacia Weishaar's Happy "Loaniversary" Annual Mortgage Review



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## ANNUAL MORTGAGE SURVEY - EMAIL TEMPLATE

Below is a sample email that Stacia and her team send to past clients requesting they complete an annual mortgage survey. The email includes a link to the survey, which can be built on platforms such as Survey Monkey or Survey Gizmo. A sample survey can be found on the next page.

Dear [Name],

Happy anniversary! It is hard to believe its your “loaniversary” and this much time has passed since we helped you with the financing of your home. We hope life is wonderful.

One of the many promises to our clients is to provide you with customized information relevant to your mortgage financing needs. By understanding a bit more about your current financing, we can be ready to assist you in the future. This information will also allow us to confirm your current mortgage is the right solution.

Please [click here](#) to complete a brief survey (this should take 3-5 minutes). Once finished, there is a link to my calendar to schedule 10 minutes to chat with me about your financing, the current real estate market and interest rates. Also, during our meeting I will share a real estate report card illustrating the health of your local real estate market.

Each year we will repeat this process, so at any time in the future Team Weishaar is fully prepared to assist you with your mortgage and housing goals. Thank you for letting us serve you. As always, your biggest compliment to Team Weishaar’s mortgage practice is the referral of those you know and love.

Warmly,

Stacia Weishaar & Team Weishaar

## ANNUAL MORTGAGE SURVEY

Team Weishaar is committed to bringing delightful refuge to all aspects of our clients mortgage financing needs. An annual review is one of many ways we guide you on how to capitalize on your largest investment, your home. Thank you for completing this survey.

- 1. Borrower Name \***
- 2. Borrower Email \***
- 3. Borrower Phone**
- 4. Co-Borrower Name**
- 5. Co-Borrower Email**
- 6. What homeownership goals would you like to achieve in the next 5-10 years?**
- 7. Could there be any planned changes in your budget in the next 5 years?**  
*(Purchasing a second home, major renovations, tuition payments, care for elderly family member, etc.)*
- 8. Have there been any planned changes in your household income over the past year?**
- 9. Do you expect any planned changes to your household income in the next 2-5 years?**
- 10. Please share your approximate value of your existing home.**
- 11. How long do you plan to live in your home?**
- 12. Do you have a second mortgage?**
- 13. Would you be interested in leveraging your existing home equity to achieve any of the following?**  
*(Lower monthly mortgage payments, Paying down debt - credit cards, student loans, etc., Developing a cash reserve or investing, Other)*
- 14. Which of the following financial goals are most important to you?**  
*(Building overall wealth, Paying off mortgage prior to retirement, Establishing a rainy-day savings account, Investing in real estate, Investing in the secondary market, Moving into a larger home within 5-10 years, Downsizing into a smaller home within 5-10 years, Maximizing current and future tax deductions, Saving money for family - tuition, healthcare, leisure, etc.)*
- 15. Select all the loan scenarios that you might be interested in:**  
*(15-year mortgage, Adjustable rate mortgage, Home equity line of credit, Reverse mortgage)*
- 16. Would you be interested in learning more about any of the following?**  
*(Homeowner's Insurance, Life Insurance, Investment Advice, Legal Advice)*
- 17. Do you have any mortgage, home or financial needs or questions I can address?**