

# It's all about you!

We strive to develop personal relationships with each of our clients. Please provide some information to help us give you the service you deserve! Just so you know, your responses do not affect your eligibility for a home loan.



## YOUR NAME

PHONE

BIRTHDAY

HOMETOWN

COLLEGE

## WHAT ARE SOME OF YOUR FAVORITE THINGS? *List your partner's, too!*

HOBBIES

RESTAURANT

STORE

MOVIE

CANDY / TREAT / DESSERT

BEVERAGE

CHARITY / CAUSE / CHURCH

ATHLETE / TEAM

## YOUR SPOUSE/PARTNER'S NAME

ANNIVERSARY

BIRTHDAY

HOMETOWN

COLLEGE

## EVERYONE LOVES TALKING ABOUT THEIR KIDS! *Tell us about yours!*

NAME

BIRTHDAY

## WE'RE EXCITED TO BE YOUR MORTGAGE PARTNER! *Who else do you work with?*

Y / N

IF YES, RANK ON A SCALE OF 1 - 5  
(1 Bad / 5 Great)

Financial Planner

1 2 3 4 5

Insurance Agent

1 2 3 4 5

Accountant

1 2 3 4 5

**Thanks for sharing! Now let's get you a mortgage!**



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