



# INTAKE SHEET

Date

*'Your Current Debt/Income/Excess Snapshot'*

Name -

Address -

Phone#

Email -

## MORTGAGES

Lender Name	Mortgage Start Date	Mortgage Term	Monthly Payments*	Extra Principle Payments	Interest Rate	Escrow Payment	Mortgage Insurance Payment	Current Mortgage Balance	Original Mortgage Amount

*\*Including Principle, Interest, Escrow, PMI/Mortgage Insurance, etc.*

## LOANS

Account Name*	Loan Start Date	Loan Term	Monthly Payment	Extra Principle Payment	Interest Rate	Current Loan Balance	Original Loan Amount

*\*Auto Loans, Student Loans, Personal Loans, Business Loans*

## REVOLVING CREDIT

Type of Credit*	Current Balance	Minimum Payment	Extra Principle Payment	Interest Rate	Credit Limit	Credit Limit

*\*LOC - Line of Credit, Credit Card, HELOC - Home Equity Line of Credit*

## AVERAGE HOUSEHOLD NET INCOME

Income Source	Payment Frequency*	Average Net Income Per Paycheck

*\*Every Week, Every Other Week, Once a Month, Twice a Month, Every Three Months, Twice a Year, Once a Year*

Monthly Expenses (All Bills--Food, Gas, Electric, Internet, Etc.)

AND

Monthly Discretionary Income (EXCESS--left after Bills & Debts are Paid)

Addt'l Info	State	Age	D of B	Nicotine	Your Health	Medications	\$ > 401k
You							
Spouse							