

Denver **LENDING**

CLIENT QUESTIONNAIRE

- **What is your preferred style of communication (i.e. Direct and to the Point, Detailed – I’s dotted, T’s crossed or a mixture of both)?**
- **What is a comfortable monthly payment for the new mortgage?**
- **Do you track your cash flow on a monthly basis?**
 - **Would you like us to send you a copy of our monthly cash flow tracker?**
- **How long do you plan to keep the new residence?**
- **Do you have any expected changes to income or assets? (i.e. gifts)**
- **Do you have any life changes expected in the future? (i.e. children, employment?)**
- **What are the 3 most important things you are looking for in a lender?**
- **On a scale of 1 to 10, how comfortable are you with your retirement and college planning?**
- **Have you ever thought about using real estate as a wealth building vehicle? If yes, 5 in 10**
- **In regards to your financial health, do you have any questions we can answer for you?**