

Reverse Mortgage Fax Back Form

Simply fill in the form below and fax it directly to me. I will review your specific situation and respond to you with the information that you need, all with complete privacy and confidentiality guaranteed.

What are your Goals? Please check all that apply:

- Refinance to pay off current mortgage and eliminate monthly payments
 Refinance to get monthly cash – Amount desired \$_____/month
 Refinance to obtain lump sum of cash for WHATEVER I WANT!!! (new car, kitchen, etc.)
 Home Purchase
 Not sure yet other (please explain)_____

Your Contact Information

Your name: _____ Date of Birth _____

Spouse Name: _____ Date of Birth _____
(or co-borrower)

Phone number: _____ Fax number: _____

Email address: _____

Best time of day to call: _____

Property Information

single family home condo other

Address: _____

Current Market Property Value (estimate) _____

Balance due on your Current Mortgage _____

Condo Owners only: Are there RESERVE FUNDS in the Condo Budget for your HOA? **YES** **NO**

Are there any active/pending LAWSUITS against the HOA? **YES** **NO**

Important questions that will help us to avoid possible pitfalls:

Is your property held in a TRUST? **YES** **NO**

Is there a POWER OF ATTORNEY involved? **YES** **NO**

Are there any REPAIRS that need to be done? **YES** **NO**

Have you been properly EDUCATED about reverse mortgages by a REVERSE MORTGAGE EXPERT? **YES** **NO**

Do you have children, a financial advisor, a religious advisor, or friends that will be involved in the decision making process with you? **YES** **NO** If so, Who? _____



FAX back
directly to Kevin at

1-408-825-6320