

It's All About YOU!

dankkeller
MORTGAGE ADVISOR

naf newamerican
FUNDING

We strive to develop a strong professional relationship with each of our clients. This form will help us better serve you during and after the mortgage process!

Name: _____ Spouse/Co-borrower _____

Are you a first time homebuyer or do you have a home to sell? _____

What are the main reasons why you are looking to purchase a home? _____

What are your biggest concerns entering this process? _____

What is the most important quality you are looking for in a mortgage professional? _____

Who can we thank for introducing you to us _____

More About You – (Some of your favorite things...)

Your B-day: _____ Spouse's B-day: _____ Wedding Anniv.: _____
children living with you: _____ *their birthday (mon/day):* _____

Pets/Names? _____

Fav soda or cold drink? _____ Spouse/Co: _____

What college did you attend? _____ Spouse/Co: _____

Fav. restaurant? _____ Spouse/Co: _____

Fav. adult beverage? _____ Spouse/Co: _____

Favorite charity? _____

Fav. dessert? _____ Spouse/Co: _____

Fav. candy/snack _____ Spouse/Co: _____

We're Excited To Be Your Mortgage Partner!

Who Else Is On Your Wealth Team? (If "yes", please rank them...)

*rank on a scale of 1-5
(5 being best)*

YES/NO						
Financial Planner	_____	⊙ 1	⊙ 2	⊙ 3	⊙ 4	⊙ 5
Insurance Agent	_____	⊙ 1	⊙ 2	⊙ 3	⊙ 4	⊙ 5
Accountant	_____	⊙ 1	⊙ 2	⊙ 3	⊙ 4	⊙ 5

We Need Your Help!

When we do a great job and exceed your expectations, can we count on you to recommend us to at least ONE person who may benefit from our services in the coming 12-months?

☐ Yes

☐ No