



UNION WEST

Financial

Information Needed to Better Assess Your Needs

Union West Financial is a unique company. We review your complete financial picture and approach credit and debt from a financial planning perspective. In order for us to make the most informed recommendations for you, we need to obtain the following information:

A little about you and your spouse/partner (if applicable)

1. Your name _____
2. Your spouses/partners name (if applicable) _____
3. Preferred method of contact if needed: _____
4. What do you do to earn a living? _____
5. Who is your employer? _____
6. What is your position? _____
7. How long have you been with your current employer? _____
8. How long have you been in the industry? _____
9. Spouse/partner's occupation (if applicable) _____
10. Spouse/partner's employer (if applicable) _____
11. Spouse/partner's position (if applicable)? _____
12. Spouse/partner's length of time with current employer (if applicable)? _____
13. Spouse/partner's length of time within the industry (if applicable)? _____

Your home

1. When did you purchase your home? _____
2. What was the purchase price? _____
3. What do you think the property is worth now? _____

Your monthly expenses

1. What type of mortgage or mortgages (if you have a second also) do you currently have on the property? _____
2. Is the loan fixed or adjustable? _____
3. What is the interest rate? _____
4. Are property taxes and homeowner's insurance included in your monthly mortgage payment? _____
5. How much are your property taxes and homeowner's insurance? _____
6. How much is your HOA fee? _____

Other Properties (if applicable)

1. When did you purchase your other property(s)? _____
2. What was the purchase price(s)? _____
3. What do you think the property(s) is worth now? _____
4. What type of mortgages do you have on any other properties? _____



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A little about your current income and expenses

1. How much do you earn? _____
2. How do your earnings breakdown, i.e., salary, bonus, commission, etc.?

3. How much does your spouse/partner earn? _____
4. How do those earnings breakdown, i.e., salary, bonus, commission, etc.?

5. How much are your total monthly expenses? _____
6. In other words, what is your total monthly "nut"? _____

A little about your investment habits

1. How much do you contribute to your retirement account and to savings?

2. Is it automatic? _____
3. How much do you have in total assets? _____
4. Can you break them down between:
 - a. checking/savings _____
 - b. investments _____
 - c. retirement accounts _____

In addition to the above information, we would like to prepare a full credit history and list of liabilities. In order for us to order your credit report, we need your authorization and your social security number(s).

Do we have your approval? _____

What are your social security number(s)?

Yours _____-_____-_____
Spouse/partner's _____-_____-_____

Thank you for your interest in Union West Financial. Please don't hesitate to contact us if you have any questions or require further information. We would appreciate it if you could provide the above information to us at least 24-48 hours prior to your appointment.

Sincerely,

Eric Union,
President & Certified Mortgage Planner
Union West Financial