



REFINANCE INTAKE FORM

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Instructions: Please complete this form as thoroughly as possible. All information provided will be kept confidential and used solely for the purpose of your refinance closing.

BORROWER INFORMATION	
Borrower Name(s):	
Social Security Number (Borrower 1):	
Social Security Number (Borrower 2):	
Marital Status:	☐ Single ☐ Married ☐ Divorced ☐ Widowed ☐ Free Trader
Spouse Name (if applicable):	
Borrower's Mailing Address:	
Primary Phone Number:	
Secondary Phone Number:	
Email Address:	
PROPERTY INFORMATION	
Property Address:	
Is This Your Principal Residence?	☐ Yes ☐ No
If No, Principal Residence Address:	

NEW LOAN INFORMATION	
Lender Name:	
Loan Officer Name:	
Loan Officer Phone Number:	
Loan Officer Email:	
Estimated New Loan Amount:	
CURRENT MORTGAGE INFORMATION	
Current Lender 1 Name:	
Current Loan Number:	
Current Lender Phone Number:	
Equity Line?	☐ Yes ☐ No
Current Lender 2 Name:	
Current Loan Number:	
Current Lender Phone Number:	
Equity Line?	☐ Yes ☐ No
Current Lender 3 Name:	
Current Loan Number:	
Current Lender Phone Number:	
Equity Line?	☐ Yes ☐ No
INSURANCE INFORMATION	
Homeowner's Insurance Company:	
Insurance Agent Name:	
Insurance Agent Phone Number:	
Insurance Policy Number:	
CLOSING PREFERENCES	
Refinance Proceeds After Closing:	☐ Pick Up

	☐ Mailed ☐ Wired (\$30 fee)
Special Instructions or Concerns:	

DISCOUNTED ESTATE PLANNING SERVICES

Hedgebeth Carter Law Group is pleased to offer discounted estate planning documents to clients using our real estate services. **For only \$500 at closing**, we can provide: a simple will, healthcare power of attorney, advance directives for end-of-life care, and general power of attorney.

Would you like these services?	☐ Yes ☐ No
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By submitting this form, I acknowledge that the information provided is accurate and complete to the best of my knowledge.

Signature: _____ Date: _____