



## Client Profile

**SYNOVUS**

Date: \_\_\_\_\_ Realtor: \_\_\_\_\_  
 Contact: \_\_\_\_\_

### I. Contact Information

Name(s): \_\_\_\_\_

Name(s): \_\_\_\_\_

|         |                  |
|---------|------------------|
| Address | City, State, Zip |
| Address | City, State, Zip |

|      |       |      |
|------|-------|------|
| Work | Home  | Cell |
| Work | Home  | Cell |
| Fax  | Email |      |
| Fax  | Email |      |

| Preferred Contact Method |      |      |       | Time |    |
|--------------------------|------|------|-------|------|----|
| Work                     | Home | Cell | Email | AM   | PM |
| Work                     | Home | Cell | Email | AM   | PM |

### Housing Details

| Real Estate Interest  | Time Line  |
|---|--|
| Sell Buy Rent Lease Purchase  | Today 30-90 Days 90-120 Days 6- 12 Months<br>Over a Year |
| Type of Property  | Price Range  |
| SF 2-4 Units Condo/Townhome<br>Apartment Land Commercial                                  | \$<br>\$   |
| Primary Residence Second Home Rental<br>Investment Rehab                                  | Age of Home: New Construction                            |
| Location/Area   | Preferred Style  |
| City: Zip Code:<br>School District:   |  |
| Stories: # Bedrooms:<br>Garage: # Baths:<br>Basement: # of Cars:<br>Fireplace Fenced Yard | <b>Other Amenities and Comments:</b>                     |

**Disclosure:** I agree to: Provide equal professional service without regard to the race, color, religion, sex, handicap, familial status, or national origin of any prospective client, customer, or of the residents of any community.

#### Mortgage Planner(s)

Cathy McDaniel - Cell/Text 404-550-0775, Email: cathymcdaniel@synovusmortgage.com  
 Gina Lemelin - Cell/Text 770-540-6471, Email: ginalemelin@synovusmortgage.com

**Planning for Your Home**



**Seller/Buyer Name:**  
**Contact Number:**  
**Email:**

**Realtor:**  
**Contact Number:**  
**Email:**

Today's Date: Would you like to talk with a Mortgage Planner today?  
Yes No

|   |  |
|---|--|
| <p style="text-align: center;"><b>Are you?</b></p> <p>Paying Cash<br/>                 Need a Mortgage      Refinancing<br/>                 Need a Rehab Loan    Home Equity Loan<br/>                 Downpayment Assistance Program<br/>                 Yes No<br/>                 Name of Program:<br/><br/>                 Is your downpayment a gift?<br/>                 Amount? \$<br/><br/>                 Do you have a home to sell or rent?<br/>                 Yes No<br/>                 If yes, do you have a contract?<br/><br/>                 If you rent, when will your rent contract expire?</p> | <p>Have you recently ordered a copy of your Credit Report?<br/>Yes No</p> <p>Have you talked with a Mortgage Planner?<br/>Yes No</p> <p>Have you completed a loan application?<br/>Yes No      Date:</p> <p>Have you applied online?<br/>Yes No      Date:</p> <p>Desired Mortgage Payment Range: \$</p> <p>Will you be using a co-signer?</p> |
|---|--|

Property Address:

Property Description: Age/Condition

|  |  |
|--|--|
| <p>Purchase Price: \$<br/>                 Single Family 2-4 Unit Condo Townhome<br/>                 Is the home served by a well and/or septic tank? Yes No Well Septic Tank<br/>                 Is the seller paying closing cost? Yes No<br/>                 If yes, amount \$</p> | <p>HOA/Condo Fees: \$      Monthly/Annual<br/>                 Does the property need repairs? Yes No<br/>                 What type of repairs?<br/>                 Is there a home warranty? Yes No<br/>                 Any recent inspections on the property? Yes No<br/>                 Details:</p> |
|--|--|

|   |  |
|---|--|
| <p style="text-align: center;"><b>Mortgage Company</b></p> <p>Pre-qualification      DU Approved<br/>                 Mortgage Company Name<br/><br/>                 Loan Officer:<br/>                 Phone #:<br/>                 Email:</p> | <p style="text-align: center;"><b>Loan Type</b></p> <p>FHA VA Conventional USDA NSP<br/>                 Closing Date:</p> |
|---|--|

|  |  |
|--|--|
| <p style="text-align: center;"><b>Mortgage Planner</b></p> <p>Cathy McDaniel - Cell/Text 404-550-0775<br/>                 Email: <a href="mailto:Cathymcdaniel@synovusmortgage.com">Cathymcdaniel@synovusmortgage.com</a></p> | <p style="text-align: center;"><b>Mortgage Planner</b></p> <p>Gina Lemelin - Cell/Text 770-540-6471<br/>                 Email: <a href="mailto:ginalemelin@synovusmortgage.com">ginalemelin@synovusmortgage.com</a></p> |
|--|--|



**Home Owner(s):**

**Realtor:**

**Contact Number:**

**Phone:**

**Contact Number:**

**Email:**

**Email:**

**Email:**

**Existing Mortgage Company**

**Refinance**

First Mortgage Company

Estimated Property Value: \$

Pay Off: \$

Has there been an appraisal, BPO CMA or an AVM preformed?

Yes No If yes, date:

Second Mortgage Company

Do you have a copy? Yes No

Pay Off: \$

Any there liens on property other than the mortgage(s)? Yes No

Have you talked with your current mortgage company? Yes No

If yes, explain:

Date: Comments

Are the property taxes up-to-date? Yes No

Have you received a previous loan modification? Yes No Date:

Annual taxes City/County: \$

If yes, explain details:

Is the Hazard Insurance up-to-date? Yes No

Have you received a workout offer from your lender? Yes No Date:

If no, explain:

Details:

Is flood insurance required: Yes No

Does the home need any repairs, corrections or updating? Yes

Are you working with a Housing Counselor? Yes No

No

If yes, please explain"

Name: Contact:

Is your home served by a well or septic tank?

Have you talked with a Bankruptcy attorney? Yes No

What results are you hoping to achieve today?

**Equal Housing Lender Disclosure -** We do business in accordance with the Federal Fair Lending Laws UNDER THE FEDERAL HOUSING ACT, IT IS ILLEGAL, ON THE BASIS OF RACE, COLOR, NATIONAL ORIGIN, RELIGION, SEX, HANDICAP, OR FAMILIAL STATUS (HAVING CHILDREN UNDER THE AGE OF 18) TO: Deny a loan for the purpose of purchasing, constructing, improving, repairing or maintaining a dwelling, or deny any loan secured by a dwelling; or Discrimination in fixing the amount, interest rate, duration, application procedures or other terms or conditions of such loan, or in appraising property.

**Mortgage Planner** - Cathy McDaniel - Cell/Text 404-550-0775 Email: [Cathymcdaniel@synovusmortgage.com](mailto:Cathymcdaniel@synovusmortgage.com)

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**Notes:**