



MONEY MERGE ACCOUNT™ WORKSHEET

Please make sure that the Money Merge Account™ worksheet is filled out as completely and as accurate as possible. The results of the Money Merge Analysis Report will be based on the accuracy of the information provided and is only an estimation. The results will be contingent on you following the Money Merge Account program's recommended action plan. By filling out this worksheet, you are not obligated to enroll on the Money Merge Account program. This information will be kept confidential and will only be used for inter-office processing.

CLIENT INFORMATION

NAME	PHONE () CELL () HOME () WORK () FAX	PHONE 2 () CELL () HOME () WORK () FAX	E-MAIL ADDRESS
NAME	PHONE () CELL () HOME () WORK () FAX	PHONE 2 () CELL () HOME () WORK () FAX	E-MAIL ADDRESS

PROPERTY INFORMATION

#	STREET ADDRESS	CITY	STATE	ZIP CODE	PROPERTY VALUE	TYPE
1						<input type="checkbox"/> PRIMARY <input type="checkbox"/> SECOND HOME <input type="checkbox"/> INVESTMENT <input type="checkbox"/> RENTAL <input type="checkbox"/> RENTER
2						<input type="checkbox"/> PRIMARY <input type="checkbox"/> SECOND HOME <input type="checkbox"/> INVESTMENT <input type="checkbox"/> RENTAL <input type="checkbox"/> RENTER
3						<input type="checkbox"/> PRIMARY <input type="checkbox"/> SECOND HOME <input type="checkbox"/> INVESTMENT <input type="checkbox"/> RENTAL <input type="checkbox"/> RENTER
4						<input type="checkbox"/> PRIMARY <input type="checkbox"/> SECOND HOME <input type="checkbox"/> INVESTMENT <input type="checkbox"/> RENTAL <input type="checkbox"/> RENTER

MORTGAGE INFORMATION

#	NAME OF LENDER	ORIGINAL LOAN AMOUNT	CURRENT LOAN AMOUNT	RATE	TERM	TERM REMAINING	PAYMENT	ESCROW	FIXED/HELOC	HELOC CREDIT LINE

INCOME INFORMATION

EMPLOYER	POSITION	GROSS INCOME	NET INCOME	PAY PERIOD	INCOME TYPE
				<input type="checkbox"/> WEEKLY <input type="checkbox"/> BI-WEEKLY <input type="checkbox"/> SEMI_MONTHLY <input type="checkbox"/> MONTHLY	<input type="checkbox"/> W-2 <input type="checkbox"/> COMM <input type="checkbox"/> OVERTIME <input type="checkbox"/> BONUS <input type="checkbox"/> OTHER
				<input type="checkbox"/> WEEKLY <input type="checkbox"/> BI-WEEKLY <input type="checkbox"/> SEMI_MONTHLY <input type="checkbox"/> MONTHLY	<input type="checkbox"/> W-2 <input type="checkbox"/> COMM <input type="checkbox"/> OVERTIME <input type="checkbox"/> BONUS <input type="checkbox"/> OTHER
				<input type="checkbox"/> WEEKLY <input type="checkbox"/> BI-WEEKLY <input type="checkbox"/> SEMI_MONTHLY <input type="checkbox"/> MONTHLY	<input type="checkbox"/> W-2 <input type="checkbox"/> COMM <input type="checkbox"/> OVERTIME <input type="checkbox"/> BONUS <input type="checkbox"/> OTHER
				<input type="checkbox"/> WEEKLY <input type="checkbox"/> BI-WEEKLY <input type="checkbox"/> SEMI_MONTHLY <input type="checkbox"/> MONTHLY	<input type="checkbox"/> W-2 <input type="checkbox"/> COMM <input type="checkbox"/> OVERTIME <input type="checkbox"/> BONUS <input type="checkbox"/> OTHER

DISCRETIONARY INCOME: (INCOME LEFT OVER EACH MONTH AFTER PAYING ALL MONTHLY EXPENSES (I.E., MORTGAGE, UTILITIES, CREDIT CARDS, ENTERTAINMENT, ETC.)) \$

DEBTS/CREDITORS (OTHER THAN MORTGAGE)

CREDITOR	TYPE	ORIGINAL BALANCE	CURRENT BALANCE	CREDIT LINE	ORIGINAL TERM	TERM REMAINING	PAYMENT	RATE	FLOAT	REWARDS

BANK INFORMATION

BANK NAME	ACCOUNT TYPE	BALANCE	AVERAGE BALANCE	INTEREST RATE