QUAY FINANCE

Lifespan FINANCIAL PLANNING

## Home / Investment Loan Evaluation

These few simple questions will allow Quay Finance to compare you current home or investment loan to other products through the many lenders available.

Date Completed: / /

Financial Advisor / Accountant Name:

Client Name: Email: Ph:

**Owner Occupied Property**
Current Lender:

Estimated value of your home:

Estimated balance of your mortgage:

Current Monthly Repayment, or Interest Rate:

Estimated Date of settlement of this loan: / /

**Investment Property One**
Current Lender:

Estimated value of your home:

Estimated balance of your mortgage:

Current Monthly Repayment, or Interest Rate::

Estimated Date of settlement of this loan: / /

**Investment Property Two**
Current Lender:

Estimated value of your home:

Estimated balance of your mortgage:

Current Monthly Repayment, or Interest Rate::

Estimated Date of settlement of this loan: / /

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