



Name: _____

Date: _____

Mortgage Amount:

Appraisal Amount:

Equity Amount:

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Mortgage amount – appraisal amount= Equity amount

Client Income:

Spouse Income:

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Monthly Bills:

Here, if you didn't come home last night, what is already in place that would pass on to your spouse to help him/her keep this house and this lifestyle, such as life ins, savings,retirement accounts.

Client	Spouse