



Client Mortgage Refinance Information

In order to provide you with refinance options customized for your specific needs and goals, please fill in the fields in the form below. You can either fill it out online and email it back to us, or print it and fill it out by hand, and fax to us at 610-695-8073. Alternatively, you can email your most recent mortgage statement to ddulin@independenceadvisors.com. Should there be any additional information that we require, we will contact you.

If you have any questions, please call us at (610) 695-8070.

Name:

Are You Refinancing Your Primary Residence? Yes No

If No, please provide the address of the residence you are looking to refinance:

Street Address:

City:

State:

Zip Code:

What is Your Goal? Lower Monthly Payment

Pay Less Interest

Other

How Long Do You Plan to Stay in This House (Years)?

Mortgage Origination Date:

Original Loan Amount:

Current Mortgage Balance:

Current Monthly Payment:

Current Interest Rate:

Is this rate: Fixed

Variable