

BEFORE OUR CALL · 1-PAGE PREP

Strategy Call Prep Sheet

Bring this to our 30-minute call. Two minutes of preparation makes the conversation twice as valuable — and gets you a real plan instead of a generic answer.

How to use this sheet

Fill it out the day of the call. Don't agonize — best guesses are fine. We refine the details together.

1. Goal (pick one)

- Buy investment property
- Buy primary or second home
- Refinance existing loan
- Cash-out for new investment
- Commercial / multifamily acquisition

2. Timeline

- Target close date: _____
- Already under contract? Yes / No
- Pre-approved by another lender? Yes / No (with whom: _____)

3. Property (if known)

- City and state: _____
- Estimated purchase price: \$_____
- Property type: SFR / 2-4 unit / condo / multifamily / mixed-use / other
- Intended use: long-term rental / short-term rental / primary / second home

4. Capital position

- Cash available for down payment + closing: \$_____
- Source of funds: savings / sale proceeds / gift / 1031 / cash-out / other
- Liquid reserves remaining after closing: \$_____

5. Income & credit

- Employment type: W-2 / self-employed / retired / foreign income
- Approximate annual income: \$_____
- Estimated FICO range: 760+ / 720–759 / 680–719 / below 680 / unknown
- Tax returns filed for last 2 years? Yes / No

6. The one question you want answered

Write down the single most important question you want answered on this call. We will start with that — not with my agenda.

Ready to put this into action?

Book a free 30-minute strategy call. We will walk through your file, identify the right program, and define a realistic timeline. Email nayeli@range-mortgage.com or visit range-mortgage.com/contact.