BUYER TOOLKIT

Lender conversation worksheet

Bring these questions to your lender so your search starts with a clear, comfortable plan.

LENDER / LOAN OFFICER

DATE

1. **What purchase price and monthly payment range are we reviewing?**

2. **What cash may be needed for down payment, closing costs, and reserves?**

3. **Which loan options fit the information I provided?**

4. **What documents are still needed, and when do they expire?**

5. **How long is the current pre-approval valid?**

6. **Which financial changes should I discuss with you before closing?**

7. **Who should Kate contact when we are preparing an offer?**

Practical reminder

Before taking on new debt, moving significant funds, or changing jobs, contact your lender.