



LOAN REVIEW

Your homeloan health check

NOTHING BEATS
COMING HOME.

REVIEW MEETING

AGENDA

1. Welcome *5 Min*
2. Year in review *5 Min*
3. Current situation - changes *5 Min*
4. Update to needs and objectives *10 Min*
5. Discuss future strategy and existing product *10 Min*
6. Next steps *3 min*



REVIEW MEETING

WHAT YOU WILL NEED

1. Current mortgage balances and interest rates
2. Consider your current and future objectives

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