

financial **PLANNING WORKSHEET**

 Your Name _____

Purchase Price / Pre-Approval Amount _____

Name of the Bank / Loan Officer _____

Monthly Property Tax Limit _____

Monthly HOA Limit _____

HOA Capital Contribution _____

Downpayment (Initial Deposit) _____

Closing Costs
(Approx. 3.5% - 5% of Purchase Price) _____

Out of Pocket Costs _____

Home Inspection _____

Survey _____

1 Yr Home Insurance _____

Appraisal _____

Attorney _____

Lender Required Repairs (terms) _____

Mortgage – Points / Rate Buy Down _____

Reserve Funds / Renovations _____