



## Mortgage Broker Evaluation Form

Broker Name \_\_\_\_\_

Mortgage Company \_\_\_\_\_

Broker Work Number \_\_\_\_\_

Broker Cell Number \_\_\_\_\_

Broker Email \_\_\_\_\_

Broker Website \_\_\_\_\_

1) Can you tell me a little about yourself?  
\_\_\_\_\_

2) Why did you choose to work for this firm and how many years have you been with this firm?  
\_\_\_\_\_

3) How many years have you been a mortgage broker?  
\_\_\_\_\_

4) How many mortgage transactions have you completely? How many have you completed this year?  
\_\_\_\_\_

5) How many lenders do you work with? Which lenders do you do business with often?  
\_\_\_\_\_

6) Do you belong to a mortgage broker association (i.e. CA Association of Mortgage Brokers)?  
\_\_\_\_\_

7) Who handles the processing of paperwork?  
\_\_\_\_\_

8) What guidelines do you follow to ensure the privacy and security of my personal information?  
\_\_\_\_\_

9) How is your fee paid? Can you give a breakdown of lender fees? What is your most competitive rate?  
\_\_\_\_\_

10) Based on my financial status and goals, what is your advice on what type of loan I should get?  
\_\_\_\_\_

11) Based on my financial status and credit, what is my minimum down payment on a \$\_\_\_\_\_ home?  
\_\_\_\_\_

12) Do I qualify for any special programs such as FHA or VA loans?  
\_\_\_\_\_

13) You **are** / **are not** listed in the Better Business Bureau (bbb.org). Can you tell me more about that?  
\_\_\_\_\_

14) What do you think are important factors a buyer should consider when choosing a mortgage broker?  
\_\_\_\_\_

	<b>Poor</b>		<b>Average</b>		<b>Excellent</b>
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Response time < 24 hours					
Answered questions well					
Provided good advice					
Knowledge of loan types					
Mortgage exp. > 2 yrs					
Understands your needs					