

Customer Questionnaire

Thank you for allowing us to provide the solution of a reverse mortgage to meet your financial needs. We appreciate your business and will continually strive to improve our service to you. No program can be a complete success without the feedback from new and current customers. Since you are ultimately the judge of the quality of service we provide, we ask that you complete this questionnaire so that we will know what steps to take in order to improve our service and better suit your needs.

Thank you for your help!

Customer Information

Customer Name _____

Street Address _____

City, State, Zip _____

Area Code and Phone Number _____

Return Address

Were you adequately informed regarding the information that you would need for your loan application?

Yes No
 More Information Needed

Was the Loan Originator/RMS courteous and friendly during the presentation of our products?

Yes No
 Somewhat

During the period from the initial presentation to the close of the loan, were you kept informed?

Yes No

Did the Loan Originator/RMS explain things to you in terms that were easy to understand?

Yes No
 More explanation needed

Did the Loan Originator/RMS attend the closing?

Yes No

Were you comfortable with the explanations provided at the closing of your loan regarding what you were signing?

Yes No
 More explanation needed

Were you satisfied with your overall experience?

Yes No
 Needs Improvement

Were your telephone calls returned in a timely manner?

Yes No

May we use you as a referral source?

Yes No



Consumer Equity
agency for consumer equity mortgages

101 Executive Boulevard, Elmsford, NY 10523

"Your Home for Reverse Mortgages since 1994"

