

General Data:

Name: _____ Spouse Name: _____
 Date of Birth: _____ Date of Birth: _____
 # of Children: _____ Ages: _____ # of Grandchildren: _____ Ages: _____

Will you send your children/grandchildren to college? ☐ Yes ☐ No ☐ Maybe Monthly Contribution \$ _____

Current Concerns: ☐ Debt Elimination ☐ Retirement ☐ Tax Reduction ☐ Increased Saving ☐ Increased Cash Flow

Long-Term Debt - 10 Years or More (Mortgage, Student Loans, Personal Loans, etc.)

Personal Residence: Mortgage Payment (P&I ONLY): \$ _____ Outstanding Balance: \$ _____
 Interest Rate: _____% Extra Mortgage Payments \$ _____ /Year or Month

Other Loans

<u>Debt Name</u>	<u>Amount Owed</u>	<u>Interest Rate</u>	<u>Min. Req'd. Pymt.</u>	<u>Actual Pymt.</u>
_____	\$ _____	_____%	\$ _____	\$ _____
_____	\$ _____	_____%	\$ _____	\$ _____

Short-Term Debt - Less than 10 Years (Credit Cards, Auto Loans, HELOC, medical bills, etc.)

<u>Debt Name</u>	<u>Amount Owed</u>	<u>Interest Rate</u>	<u>Min. Req'd. Payment</u>	<u>Actual Payment</u>
_____	\$ _____	_____%	\$ _____	\$ _____
_____	\$ _____	_____%	\$ _____	\$ _____
_____	\$ _____	_____%	\$ _____	\$ _____
_____	\$ _____	_____%	\$ _____	\$ _____
_____	\$ _____	_____%	\$ _____	\$ _____
_____	\$ _____	_____%	\$ _____	\$ _____

FSA/HSA: Are you contributing to an FSA or HSA? ☐ Yes ☐ No Your Annual Contribution: \$ _____

Benefits: Monthly insurance costs? Health: \$ _____ Disability: \$ _____ Life: \$ _____ DB \$ _____ CV \$ _____

Life Insurance Type: Term/Whole Life/IUL Personal or Employer **For term policy:** How many years left? _____

Taxes: Do you expect a tax refund? ☐ Yes ☐ No If so, what amount? \$ _____

Income: Monthly Income: You: \$ _____ Spouse: \$ _____

Accounts (Savings, Checking, 401(k), 403(b), 457, 529, IRA, Roth IRA, UTMA/UGMA, etc.)

<u>Financial Institution</u>	<u>Account Type</u>	<u>Account Value</u>	<u>Monthly Contribution</u>	<u>Available</u>
_____	_____	\$ _____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	\$ _____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	\$ _____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	\$ _____	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No

“If there was a way to eliminate all your debt including your mortgage, student loans and consumer debt in as little as 5-7 years without spending more to do it and create liquid wealth at the same time, would you want to know more?”

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