

Date: \_\_\_\_\_

First name \_\_\_\_\_ Last name \_\_\_\_\_

Age: \_\_\_\_\_ Birth date: \_\_\_\_\_

Spouse name: \_\_\_\_\_

Age: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Employer: \_\_\_\_\_ how long: \_\_\_\_\_

Spouse's employer: \_\_\_\_\_ how long: \_\_\_\_\_

Children:

Names: /ages: \_\_\_\_\_

\*\*\*\*\*

(Now I would like some general information from you)

Do You:

Have a will: \_\_\_\_\_ last time updated: \_\_\_\_\_

Life Ins. owned: \_\_\_\_\_

What Type: term/WL \_\_\_\_\_ Any Group Life: \_\_\_\_\_

Ins on spouse: \_\_\_\_\_

Have disability Plan: \_\_\_\_\_ details: \_\_\_\_\_

Own an IRA \_\_\_\_\_ type \_\_\_\_\_

Have Health Ins \_\_\_\_\_

Do you have mortgage? \_\_\_\_\_

Do make extra mortgage payments? \_\_\_\_\_

\*\*\*\*\* (Now I would like to get into more detail)

Who helped you devise your current insurance and savings goals and what formula did you use to determine the amount of insurance you should own and the amount of money you should have available for retirement? \_\_\_\_\_

A) What are your intermediate and long term goals?

Own home \_\_ education \_\_ own business \_\_ retirement \_\_ travel \_\_ independence \_\_ Family security \_\_ other: \_\_\_\_\_

B) Which of the above financial goals do you consider most important at this time? \_\_\_\_\_

C) Other than what we talked about, are you doing anything else to achieve your financial goals? \_\_\_\_\_

What is your favorite type of savings plan? \_\_\_\_\_

What has been average rate of return over last 5 years?

Are the earnings taxable? \_\_\_\_\_

How liquid are these funds for emergencies? \_\_\_\_\_

D) Based on today's dollar, how much retirement income would you need if you were to retire next month, assuming kids gone? \$ \_\_\_\_\_ month.

At 6% interest, how much capital would this require? \$ \_\_\_\_\_

E) If your savings habits over the last 5 or 10 years continue to age 65, will you be happy with the results? \_\_\_\_\_

(Keep in mind if you are 35 years old, you only have 360 months left to save, and if you save \$100 month, that is only \$36,000. We have to maximize your dollars.)

F) When making financial decisions, do you make your own or do have to consult someone? \_\_\_\_\_

G) If I could show you an idea that would help you accomplish some or all your financial goals, and force you to set money aside on a regular basis, what could you force yourself to set aside or reposition on a monthly basis if you really liked some of the ideas I share with you. Of course, if you did not like any to the ideas I share with you, then I wouldn't expect you to do anything with me.

What dollar amount?? \$5.00 week, \$10.00 week, \$15.00 week, \$25 week \$ \_\_\_\_\_