

EQUIS FINANCIAL NEEDS ANALYSIS

Name: _____ DOB: _____ Age: _____ Tobacco (Yes / No) If yes , type: _____ Height: _____ Weight: _____		Name: _____ DOB: _____ Age: _____ Tobacco (Yes / No) If yes , type: _____ Height: _____ Weight: _____	
Prescriptions:	Condition & Year Diagnosed:	Prescriptions:	Condition & Year Diagnosed:
Driving Record: _____		Driving Record: _____	
Monthly Income and Sources: _____ _____		Monthly Income and Sources: _____ _____	
Total Monthly Income: _____			
Mortgage Balance: \$ _____ Equity: \$ _____ Length of Loan: _____		Mortgage Payment: \$ _____ x12: _____	
Do they plan to pay extra to pay off your mortgage early? (Yes / No) If yes , how much extra are they paying? _____			
Current life insurance outside of work? (Yes / No) If yes , what are the details?: _____		Current life insurance outside of work? (Yes / No) If yes , what are the details?: _____	
Have they ever changed jobs where they had a retirement plan in place? (Yes / No) If yes , where is that plan now?: _____		Have they ever changed jobs where they had a retirement plan in place? (Yes / No) If yes , where is that plan now?: _____	
Do they have any other income sources that their spouse could use to pay bills in the event of their death or major illness (<i>old 401K, stocks, savings, etc.</i>)? (Yes / No)? If yes , what are the details?: _____		Do they have any other income sources that their spouse could use to pay bills in the event of their death or major illness (<i>old 401K, stocks, savings, etc.</i>)? (Yes / No)? If yes , what are the details?: _____	
Do they want to speak with a specialist about managing their assets? (Yes / No)		<input type="checkbox"/> Would like their information forwarded to a specialist.	
Do they have any concerns about debt? (Yes / No). If yes , do they want to speak with a specialist about reducing their debt in half the time or less? (Yes / No)		Do they have any concerns about debt? (Yes / No). If yes , do they want to speak with a specialist about reducing their debt in half the time or less? (Yes / No)	