***RYD Referral Question**:*

At Closing, did they go over the program with you about how to pay-off your mortgage in half the time or less without refinancing?

EQUIS FINANCIAL NEEDS ANALYSIS

Mortgage Balance: $ _____ Equity: $_____ Length of Loan _____ Mortgage Payment: $ _____ x 12 _____

Do they plan to pay extra to pay your mortgage off early? { Y or No } If so, how much extra are you paying? _____

Name: _____ DOB: _____ Tobacco (Yes or No) If Yes Tobacco, Type: _____ Height: _____ Weight: _____ Do they work? (Yes or No) Monthly Income $ _____ Have they changed jobs in the last 5 years? (Yes or No) Current Life Insurance Outside of Work?: (Yes or No) If Yes, what are the details of their current Life Insurance? _____ Do they have any other income sources that their spouse could use you to pay bills in the event of their death or major illness? Old 401K , Stocks, Savings, etc? Yes or No	Name: _____ DOB: _____ Tobacco (Yes or No) If Yes Tobacco, Type: _____ Height: _____ Weight: _____ Do they work? (Yes or No) Monthly Income $ _____ Have they changed jobs in the last 5 years? (Yes or No) Current Life Insurance Outside of Work?: (Yes or No) If Yes, what are the details of their current Life Insurance? _____ Do they have any other income sources that their spouse could use you to pay bills in the event of their death or major illness? Old 401K , Stocks, Savings, etc? Yes or No
Prescriptions / Condition/ Yr Diagnosed	Prescriptions / Condition/ Yr Diagnosed

Debt Relief Program Appointment Info

Now, _____ (Clients Name) You didn't receive the information on how to pay-off the mortgage in half the time or less at closing. I'd imagine you'd like to pay your mortgage off in half the time or less without refinancing, wouldn't you? Let me get you in touch with the Specialist, I don't handle that, I just do the Mortgage Protection side of things. They specialize in early mortgage and debt elimination. I have the specialist's calendar pulled up, what time do you and _____ (spouse) normally get home from work? You'll both need to be available. _____
(Specialist Name) has an opening on _____ (Day) at _____ (time) or _____ (time). Which one time did you want? (This will be a phone call)

Okay, I just confirmed your spot on the Specialist (Specialist Name) calendar for….

Day_____ Date _____ Time _____

5.31.22