

EQUIS FINANCIAL NEEDS ANALYSIS

Mortgage Balance: \$_____ Equity: \$_____ Length of Loan: _____ Mortgage Payment: \$_____ x12: _____

Do they plan to pay extra to pay off your mortgage early? (Yes / No) If so, how much extra are you paying? _____

<p>Name: _____ DOB: _____ Tobacco (Yes / No) If yes, type: _____</p> <p>Do they work? (Yes / No) Monthly Income: _____</p> <p>Have they changed jobs in the last 5 years? (Yes / No)</p> <p>Current life insurance outside of work? (Yes / No) If yes, what are the details of their current life insurance?: _____</p> <p>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 (<i>old 401K, stocks, savings, etc.</i>)? (Yes / No)</p>	<p>Name: _____ DOB: _____ Tobacco (Yes / No) If yes, type: _____</p> <p>Do they work? (Yes / No) Monthly Income: _____</p> <p>Have they changed jobs in the last 5 years? (Yes / No)</p> <p>Current life insurance outside of work? (Yes / No) If yes, what are the details of their current life insurance?: _____</p> <p>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 (<i>old 401K, stocks, savings, etc.</i>)? (Yes / No)</p>
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Prescriptions:	Condition & Year Diagnosed:	Prescriptions:	Condition & Year Diagnosed:
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DEBT RELIEF PROGRAM APPOINTMENT INFORMATION:

Now, _____ (*Client's 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's 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's name*) calendar for....

Day: _____ Date: _____ Time: _____