



## WHAT WE DO:



### MORTGAGE PROTECTION

Do you have a plan to pay your mortgage in the event of your death? Don't lose your family's most valuable asset due to poor planning.



### LIFE INSURANCE

How much coverage is enough? Make sure your family is protected with enough coverage to provide for them when you are gone.



### FUTURE INCOME PLANNING

Are you concerned with market volatility? There is a little known secret to keep your money safe during market corrections.

**THREE OBJECTIVES | Affordable • Comfortable • See If You Qualify**

Mortgage/Rent: \_\_\_\_\_ Mortgage Term: 15 • 20 • 30 | Refi or Purchase

House Value: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Equity: \_\_\_\_\_ Do you pay extra toward mortgage to pay off loan early? Y / N \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Occupation: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

Medications: \_\_\_\_\_ Smoker: Y / N \_\_\_\_\_

Surgeries: \_\_\_\_\_

Family: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Occupation: \_\_\_\_\_

Monthly Income: \_\_\_\_\_

Medications: \_\_\_\_\_ Smoker: Y / N \_\_\_\_\_

Surgeries: \_\_\_\_\_

Family: \_\_\_\_\_

**Medical Conditions:** Heart Attack / Stroke / TIA / Cancer / Stints / Diabetes (Pills vs Insulin) / Neuropathy / HBP  
Lupus/RA / Asthma & COPD (Albuterol vs Corticosteroid) / Thyroid / Anxiety-Depression / Kidney or Liver Disease

What do you have to offset the cost of the mortgage when you die? Amount: \$ \_\_\_\_\_

401k • IRA • STOCKS • BONDS • MUTUAL FUNDS • C.D.'S • SIGNIFICANT SAVINGS

Do you have life insurance? Y / N - Private / Work

If Yes, with who? How much? \_\_\_\_\_ Beneficiary: \_\_\_\_\_

Do you have identity theft protection? Y / N Do you have a will? Y / N Last updated? \_\_\_\_\_

What most people do is they want to put something in place, so that if you died or became disabled yesterday, money would come in the family today to take care of the mortgage.

We can't decide right now but if you were to qualify, which option would be the most comfortable for you?