

# Financial Goals Assessment



\_\_\_\_\_  
Your Name

\_\_\_\_\_  
eMail Address

\_\_\_\_\_  
Phone

Own your home?     Y     N

Aprox years left on Mortgage? \_\_\_\_\_

Mortgage Balance? \_\_\_\_\_

Do you have other debt (auto, credit cards, student loans, etc) totalling more than \$3000?     Y     N

Are you, or your spouse/domestic partner, an "employee" for purposes of income taxes... or are you self-employed (full or part time) and/or an independent contractor?

Both Employees

Both Self/Indep Contractor

One of each

Retired/Not Employed

Briefly describe your most immediate financial goals: getting debt free, saving for college, investing, saving for retirement, saving for travel, etc.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If there was a way you could achieve your financial goals much faster... If it did NOT involve having to change your budget or lifestyle in any significant way...

AND if it did not involve refinancing or doing anything that could "ding" your credit PLUS it saved you thousands\*...

- average savings: \$100K and...
- Save 50% on mortgage interest

Would you be open to taking a look at it?     Y     N

If "Yes," we will EMAIL you some preliminary information for your review, then follow up by phone. Do you prefer chatting....

\_\_\_\_\_ Weekdays    \_\_\_\_\_ Weekends

\_\_\_\_\_ Evenings after: \_\_\_\_\_ o'clock

