

Financial Information Form

Insured _____ Office _____

Street Address _____ Agent _____

City, State, Zip _____

Email _____ Phone _____

Mortgage Information

Lender	Interest %	Term	Loan Amount	Payment	Accelerated

Insurance Information

Type	Face Amount	Purpose	Premium	Cash Value	Carrier

Assets

Type	Current Value	Purpose	Contribution	Current ER?	Provider
401k				Y N	
403b				Y N	
457				Y N	
IRA				Y N	
Pension				Y N	
Annuity				Y N	
CD				Y N	
Savings				Y N	
Investment				Y N	

Combined Monthly Income: _____

Debt Information

Credit Card Debt	Student Loan Debt	Personal Debt	Personal Debt	Car Loan Debt

Client Qualification Survey

If They're Still Working...

Has your current advisor gone over exactly what your income gap will be when you retire? OK great, what is it approximately?

Yes No

Is it better to find out what that "gap" is now or when you retire?

Now Later

Based on what you're doing now and your average rate of growth, will your current retirement accounts fill that gap?

Yes No

Can you tell me, within a couple hundred dollars, what you're paying in fees every year?

Yes No

If you're paying way more in fees every year than the average investor, would you want to know?

Yes No

On a scale of 1 to 10, with 10 being you know every nook and cranny of your investment, including average rate of return over the last five years, exact fee structure, and how much income it will generate, one being you open your statement, look at the bottom line and put it away, what would your number be?

If They Have Any Debt...

Do you feel like your debt (credit card, student loan, mortgage) is preventing you from contributing to retirement?

Yes No

If your mortgage was paid off, would retirement be more comfortable?

Yes No

If you had no debt, do you think you could retire sooner?

Yes No

FIF Social Security Reset Question

Have you consulted with a National Social Security Advisor regarding the ideal time to draw from and maximize your income?

Yes No

Has your advisor gone over how drawing from your retirement accounts will affect how your social security is taxed?

Yes No

If we could show you how to increase your social security income by up to 24%, would that be valuable to you?

Yes No

Did you know that as of 2014 there are 567 ways for a couple to draw their social security? In fact, 80% of Americans draw from social security to the detriment.

Yes No

If They're Already Retired...

Do you know what your average rate of return has been over the last five or six years? Do you think it's important to know?

Yes No

Can you tell me, within a couple hundred dollars, what you're paying in fees every year?

Yes No

If you're paying way more in fees every year than the average investor, would you want to know?

Yes No

On a scale of 1 to 10, with 10 being you know every nook and cranny of your investment and exactly what you're paying in fees, one being you open your statement, look at it and put it away, what would your number be?

“We have a retirement division whose primary focus is education. To make sure that instead of being a 3 on that scale, you're a lot closer to a 10 and actually understand the vehicle that's supposed to provide you income for the rest of your life! They'll get you the information, and you can do whatever you want with it. If I said same time next week, that would work for the two of you, right?”

We have a division whose primary focus is debt payoff. They can educate you on how you could potentially pay off all your debt, including your mortgage, in nine years or less without spending any additional money. Having your mortgage and your debt paid off so you could have a more comfortable retirement in their goal. They'll get you the information and do with it whatever you want. If I said same time next week, that would work for the two of you, right?”