

FIRE MY MORTGAGE [®] .COM

Because Life is Better Without One!

Thank you for filling this out as accurately as possible and returning it to Docs@FireMyMortgage.com at least one day in advance of our meeting.

NON-DISCLOSURE AGREEMENT

By filling out the following questionnaire, the Client agrees to keep our confidential information confidential. This includes the agreement to not:

1. Disclose our confidential information to any third party;
2. Use our confidential information in competition with us;
3. Use our confidential information in any way that harms us; and/or
4. Use our confidential information for your own business advantage.

We, in turn, agree to keep your information strictly confidential as well and will only discuss your situation with those whom you have authorized.

To state your agreement to these statements, please initial:

Person 1

Person 2

* Required

All About You!

Name: _____

Email Address: _____ Date of Birth: _____

Phone: _____ Approximate Credit Score: _____

Name of Partner/Spouse: _____

Email Address: _____ Date of Birth: _____

Phone: _____ Approximate Credit Score: _____

Street Address: _____ County: _____

City, State, Zip _____ Date Moved In: _____

Goals

What is important to you?	You	Partner/Spouse
Pay off Debt		
Requote Home and Auto Insurance		
Develop a Budget		
Provide for Family in the event of Disability		
Purchase New Home or Investment Property		
Plan for Tax-Friendly Retirement/Build Wealth		
Create Will and/or other Estate Documents		
Provide for Family in the event of early Death		
Leave legacy money to loved ones and/or Organization(s)		
Other Goal _____		

Income

Employee	Employer	Monthly Take Home	Monthly Ave. Commission/Bonus
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$

If 1099: On average, how much do you pay monthly for income taxes? \$ _____

Average Monthly Expenses

Housing

Phones	
Electric	
Nat'l Gas	
Water/Sewer	
Trash Pickup	
Cable	
Internet	
Security	
Lawn	

Recreation

Netflix	
Amazon	
Hulu	
Disney	
Sports	
Movies	
Travel	
Theatre	

Insurance

Health	
Disability	
LTC Ins.	
Life	
Life	
Life	
Life	
Umbrella	

Transportation

Lease 1	
Lease 2	
Insurance	
Auto Fuel	
Car Wash	

Family

Clothing	
Tuition	
Child Care	
Supplies	
Sports	

Giving

Food

Groceries	
Dining	
School Lunch	
Pets Food	

Beauty

Hair	
Nails	
Dry Clean	

Legal

Attorney	
Alimony	
Child Support	
Late Tax	

Health

Co-Pays	
Prescriptions	
Supplements	
Chiropractic	
Gym	
Pets	

Going into Savings

529	
Brokerage	
IRA	
IRA	
ROTH	
ROTH	
Cash Savings	
Other	

Current Balances

529	
Brokerage	
IRA	
IRA	
ROTH	
ROTH	
Cash Savings	
Other	

We look forward to sharing your Mortgage-Free date. Because Life is Better Without One!



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Additional Notes

Is there any more information you care to share?

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