



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.

FAMILY FIRST LIFE

Date: _____

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?



FINAL EXPENSE WORKSHEET

- 1) No Burial Life Insurance
- 2) Need More Life Insurance
- 3) Leave behind money for legacy

Name and Age:

Retired / Employed:

Social Security / Pension / Both:

Medicare / Med Sup:

Life Ins / Annuity:

401K/IRA/Stock/SEP/TSP/MF/CD:

Burial / Cremation

QUALIFIED DISCOUNTS -

Tobacco: Yes / No

Credit Union / Financial Institution / Dex

Name and Age:

Retired / Employed:

Social Security / Pension / Both:

Medicare / Med Sup:

Life Ins / Annuity:

401K/IRA/Stock/SEP/TSP/MF/CD:

Burial / Cremation

QUALIFIED DISCOUNTS -

Tobacco: Yes / No

Credit Union / Financial Institution / Dex

Heart Attack / Stroke / TIA / Stents / Cancer / Diabetes (Pills vs Insulin) / Pain Meds / HBP / Cholesterol
 Asthma & COPD (Albuterol vs Corticosteroid) / Thyroid / Anxiety & Depression / Alzheimers / Dementia

Medical Conditions/Hospitalizations/Surgeries:

Prescription List (Name, Dosage, Frequency):

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Prescription List (Name, Dosage, Frequency):

OPTION #1

OPTION #2

OPTION #3

Name of Beneficiary:

DOB:

Relationship to Insured:

Name of Beneficiary:

DOB:

Relationship to Insured: