

Date: \_\_\_\_\_

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

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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 \_\_\_\_\_

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Name: _____	Age: _____
Occupation: _____	
Monthly Income: _____	
Medications: _____	Smoker: Y / N _____
Surgeries: _____	
Family: _____	

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**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

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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? \_\_\_\_\_

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**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?**

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