



(Confidential)

Financial Wealth Evaluation

Name: _____

Date: _____

Email: _____

Phone: _____

1. To provide financial security for your financial future, **Would you consider that it's**
- unimportant important very important

If we could show you how to improve your financial situation **at no cost to you**, which of the following would you like to learn more about? **Please check all that apply;**

- | | |
|---|---|
| <input type="checkbox"/> 7702 IRS Tax Code | <input type="checkbox"/> Emergency Fund |
| <input type="checkbox"/> Life Insurance/ Protection for my Family | <input type="checkbox"/> College Education Fund |
| <input type="checkbox"/> Personal Pension Plan | <input type="checkbox"/> Estate/Legacy Planning |
| <input type="checkbox"/> 401k/IRA Rollover | <input type="checkbox"/> Free Personal/Business Financial Checkup |

2. Do you have an Updated **Will**? Yes No

3. Do you currently have **Life Insurance**? Yes No

4. If you **Qualify** for the upgrade:

would you prefer paying the same and getting more coverage

staying with the same coverage and paying less

5. Does your company provide you with a retirement plan? Yes No

a. If yes, what kind? _____

Are you currently participating in it? Yes No

b. Do you have any retirement plans outside of work? Yes No

c. If we could lower your fees to your retirement plan would that be something you would be interested in ? Yes No

d. Have you heard of the 7702 IRS Tax Code? Yes No

Would you like to learn more about it? Yes No

6. Outside of **tomorrow**, at what age would you like to retire? _____

a. How much money do you think you would need per month to retire comfortably, and stay retired? \$\$_____. Are you on track to reach that goal? Yes No

7. If we can show you a way to get on track, would you be open to it? Yes No

When can we call you to schedule an appointment for a Financial Check-up? Date _____

WE PROVIDE SOLUTIONS FOR YOUR FINANCIAL WEALTH