

### **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:_____	Name:_____Age:_____
Occupation: _____	Occupation:_____
Monthly Income: _____	Monthly Income: _____
Medications: _____ Smoker: Y / N	Medications: _____ Smoker: Y / N
Surgeries: _____	Surgeries: _____
Family: _____	Family: _____

**Medical Conditions:** Heart Attack / Stroke / TIA / Cancer / Stints / Diabetes (Pills vs Insulin) / Neuropathy / HBP / Lupas/RA / Asthma & COPD (Albuterol vs Corticosteriod) / 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 and how much?\_\_\_\_\_ Beneficiary:\_\_\_\_\_

Do you have identity theft protection? Y / N Do you have a will? Y / N Last updated?\_\_\_\_\_

Do you have any unsecured debts? If Yes, Total Amount: \$\_\_\_\_\_

CREDIT CARDS  
- Department Stores  
- Gas

LOANS  
- Personal / Student  
- Business

MEDICAL BILLS  
TIMESHARE PROPERTIES  
COLLECTION ACCOUNTS

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?