

DISCOVERY FORM

Confidential Questionnaire

Media Source: _____

What brought you to the seminar? _____

What did you take away from the seminar? _____

Do you have any questions? _____



**BECOME
THE BANKER**
My Bank, My Money, My Way

Name: _____

Address: _____

Yearly Income: _____

Spouse: _____

Occupation: _____

Yearly Income: _____

Number of Children: _____ Ages: _____

Male _____ Female _____

Date of Birth: ____/____/____

Occupation: _____

Employer: _____

Business Value if Self Employed: _____

Male _____ Female _____

Date of Birth: ____/____/____

Employer: _____

Business Value if Self Employed: _____

YOUR FUTURE

What does financial security look like to you? _____

How does retirement look for you? _____

How much money can you afford to loose? _____

WHERE ARE YOU FINANCIALLY TODAY?

Total net income, including dividends and investments: _____

Monthly Expenses:

Mortgage: _____

Car Loan: _____

Credit Cards: _____

Utilities: _____

Car Ins.: _____

Other Ins.: _____

Groceries: _____

Gasoline: _____

Phone: _____

Internet/Cable: _____

Medical/Dental: _____

Other: _____

Other: _____

Other: _____

Other: _____

Other: _____

Monthly Income - Monthly Expenses = Discretionary Income: _____

Emergency Fund: _____

Assets:

Savings Acct: _____

Money Mkt: _____

Current 401K, IRA, etc. _____

Stocks, Bonds, Mutual Funds: _____

CDS: _____

Orphan 401K, IRA, etc. _____

Real Estate:

Personal Residence Information:

Type of Mortgage: _____ Interest _____
Fixed Term: _____ Years ARM _____ Years

Payment (P&I Only): _____

Outstanding Mortgage: _____ Term Remaining: _____ Interest Rate: _____

Rental Properties Information:

Type of Mortgage: _____ Interest _____
Fixed Term: _____ Years ARM _____ Years

Payment (P&I Only): _____

Outstanding Mortgage: _____ Term Remaining: _____ Interest Rate: _____

Other Assets: _____

Total Assets: _____

Life Insurance:

Husband: Type of Life Insurance? Whole Life, Term, Universal Life Amount: _____

Premium: _____ Cash Value: _____ Death Benefit: _____

Wife: Type of Life Insurance? Whole Life, Term, Universal Life Amount: _____

Premium: _____ Cash Value: _____ Death Benefit: _____

Debt Related

Name	Int. Rate	Amount Owed	Minimum Payment	Actual Payment
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____
_____	_____ %	\$ _____	\$ _____	\$ _____

Are you paying yourself first? _____
If yes, how much? _____ Do you have a will? _____

If the Become The Banker strategy could help you achieve financial freedom, how much money could you commit to paying yourself monthly or annually without hurting your finances? _____

Any lump sum? _____

Agent Notes

