



THE CARDINAL NEEDS ANALYSIS

Name: _____ DOB: _____
Age: _____

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Age: _____

Mortgage Balance: \$ _____ Equity: \$ _____ Mortgage Payment: \$ _____ Extra Payment: \$ _____

****At closing did they go over the early pay off programs, to be able to pay off in half the time without having to refinance Y | N ****

Current Life Insurance Coverage:
Old Kind? _____ Previous Declines? _____

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What do you have that can help in a Financial Emergency?

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Tobacco? _____ Type: _____ Ht: _____ Wt: _____

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Prescriptions	Condition / Year
Driving Record	

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Monthly Net Income / Sources

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Total Monthly Income: \$

SET DEBT RELIEF PROGRAM APPOINTMENT

You mentioned no one went over the early pay off programs with you at closing, we can get you that info. I just take care of the mortgage protection side, we have specialist and a whole division that takes care of the early pay off programs. I can pull up my specialist calendar right now and see their availability, this appointment usually takes about 45-60min, its done by zoom what does your next few days / week look like.. (((((and book it!!!!))))))