

Candidate Profile

Name: _____ Date _____

How did you hear about our opportunity? _____

What are your income goals?

Year One: _____ Year Two: _____

Year Five: _____ Year Ten: _____

Who do you have the following insurance with:

Auto: _____ Life: _____

Home: _____ Disability: _____

Please Take a Moment to advise us of the Following: (mark with an "X")

Indicate the level of importance to you at this time in your life:	High	Med	Low
1. Knowing you won't outlive your retirement savings	_____	_____	_____
2. Having enough money to comfortably retire	_____	_____	_____
3. Rolling an old 401k/retirement plan into a current plan	_____	_____	_____
4. Having enough money to pay for your children's education	_____	_____	_____
5. Having enough money to pay off the mortgage, debts and provide income to your family in case of death.	_____	_____	_____
6. Having money to pay bills if you cannot work due to an illness/injury	_____	_____	_____
7. Being able to pay for the cost of Long Term Care	_____	_____	_____
8. Reducing the cost of Health insurance for your family	_____	_____	_____
9. Comprehensive coverage for Jewelry and other items that have limited coverage under a homeowners policy	_____	_____	_____
10. Lowering your monthly car payment or mortgage payment	_____	_____	_____
11. Finding a better interest rate for your savings/CD's	_____	_____	_____
12. Financial protection from lawsuits	_____	_____	_____
13. Protection for your business (property and liability)	_____	_____	_____