FAMILY FIRST LIFE

AMERICO **CVS Health. | aetna** **John Hancock | Vitality**

AMERICAN-AMICABLE LIFE INSURANCE COMPANY OF TEXAS **Mutual of Omaha** **AIG** **Global Atlantic** FINANCIAL GROUP

ROYAL NEIGHBORS OF AMERICA **Foresters** Financial **National Life Group** **TRANSAMERICA**

PROSPERITY LIFE GROUP℠ **Gerber.** **ATHENE** **COLUMBIAN FINANCIAL GROUP**

WHAT WE DO:

MORTGAGE PROTECTION

Do you have a plan to pay your mortgage in the event of your death? Dont lose your family's most valuable asset due to poor planning.

LIFE INSURANCE

How much coverage is enough? Make sure your family is protected with enough coverage to provide for them when you are gone.

FUTURE INCOME PLANNING

Are you concerned with market volatility? There is a little known secret to keep your money safe during market corrections.

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

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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   LOANS   MEDICAL BILLS
- Department Stores   - Personal / Student   TIMESHARE PROPERTIES
- Gas   - Business   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?