

FNA Input Form

Immediate Cash Needs:

	If You Die	If Spouse Dies
Pay off Mortgage	_____	_____
Pay off Consumer Debt	_____	_____
Fund Childrens Education	_____	_____
Cover Funeral Costs	_____	_____

Survivor Income Goal

If you die today, your survivors will need: _____
 If spouse dies today, you will need: _____
 \$_____ per month \$_____ per month

You would need that for 10 years or until youngest child is 18.
 _____ Years _____ Years

Debt Management Data

Home Mortgage

Mortgage Company: _____ Current Balance \$ _____ Interest Rate _____
 Year Home Purchased _____ Original Purchase Amount \$ _____ Current Value \$ _____

Payment Details

Principal & Interest Payment \$ _____ Additional Principal Payment \$ _____
 Monthly Property Taxes \$ _____
 Monthly Homeowners Ins. \$ _____ Homeowners Insurance Company _____
 Monthly Private Mort Ins. \$ _____
 Total Monthly Payment \$ _____

Consumer Debt

	Current Balance	Min. Payment	Actual Payment	Loan Type	Int. Rate
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %
_____	\$ _____	\$ _____	\$ _____	<input type="radio"/> Fix. <input type="radio"/> Rev.	_____ %

Education Data

	Child 1	Child 2	Child 3	Child 4	Child 5
Child's First Name	_____	_____	_____	_____	_____
Age When School Starts	_____	_____	_____	_____	_____
Number of Years in School	_____	_____	_____	_____	_____
Name of School	_____	_____	_____	_____	_____
Percentage You Intend To Pay	_____	_____	_____	_____	_____
Current Education Savings Balance	_____	_____	_____	_____	_____
Current Monthly Contribution	_____	_____	_____	_____	_____

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Other Goals and Dreams

Goal or Dream Name _____

Current Cost \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

Monthly Payment Required \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

Date Wanted ____/____/____ ____/____/____ ____/____/____ ____/____/____ ____/____/____

Other Information

Do You Have a Checking Account? Yes No

Do You Have Life Insurance Policies Available for Analysis? Yes No

Do You Have Mortgage Documents Available for Analysis? Yes No

Do You Have a Will? Yes No

Do You Use Tobacco in any Form? Yes No

Budget Information

How much per month, if anything, could you comfortably set aside over and above what you're already doing to go towards your financial future using the FNA? Before answering, we have some benchmarks that may help:

People with average debt and income can usually set aside about 10% of their total income. 10% \$ _____

People with above average income or low debt can usually set aside 15%...and, 15% \$ _____

for people that are just getting started and are on a tighter budget, it's usually 5%. 5% \$ _____

Which of these would you say best describes you? (circle the choice and fill in the dollar amount)

(Remember, they're not going to be held accountable to this, it just gives us something to work with)

Return Date

When would be a good time to get back together to deliver your FNA? We usually try to get back within 2 - 5 days.

Follow-up visit scheduled for: ____/____/____ Time: ____:____ am/pm

"If we can put together a plan using the Financial Needs Analysis that can take care of your short term as well as your long-term needs and we can keep it within your budget, does that sound like something that you would be interested in?"

Yes No

Representative Reminders

Did you set the return appointment for 2-5 days out?

Did you leave an Auto and Homowners insurance brochure?