



State Regulated Insurance Brokerage



Funeral & Cremation Support Services

Affordable State Regulated Insurance Carriers:



+ More Carriers Not Listed Here

WHAT WE DO:



STATE REGULATED MORTGAGE PROTECTION

Do you have a plan to pay your mortgage in the event of your death? Don't lose your family's most valuable asset due to poor planning.



STATE REGULATED FINAL EXPENSE PLANS

Burials and cremations are skyrocketing in cost. Without coverage, your family will be burdened with \$10,000 - \$20,000 in costs.



STATE REGULATED LIFE INSURANCE

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

+ Ask Your Expert About IULs & Fixed Indexed Annuities

THREE OBJECTIVES: Solve Your Problem | Make It Affordable | See If You Qualify

Problem To Be Solved: _____ Beneficiaries / Relationship: _____

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 Disabled? Y/N	Medications: _____ Smoker: Y / N Disabled? Y/N
What are meds for? _____	What are meds for? _____
Surgeries: _____ Height: _____ Weight: _____	Surgeries: _____ Height: _____ Weight: _____
Family: _____	Family: _____

Medical Background: Bi-Polar / HIV / Diabetes (Pills or Insulin) / Heart Attack / Stroke / Mini-Stroke / Cancer / Stents / Neuropathy / Diabetic Blindness / Lupus / Rheumatoid Arthritis / Asthma or COPD / Thyroid / Anxiety or Depression / Blood Clots / Embolism / Autism / Kidney or Liver Disease / Congestive Heart Failure / Dementia / Chest Pain / AFIB

Risk Factors: Suicide Attempt / Felony / DUI / Skydiving / Parachuting / Alcohol or Drug Abuse / Wheelchair / Ever Declined

What do you have to offset the your final expenses/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? _____

DoYourOwnWill.com Bank Name For Notary: _____

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 because if they passed away yesterday, money would come in to the family today to take care of their final expenses/mortgage and leave a legacy.

We can't decide right now but if you were to qualify, which option would be the most comfortable for you?