

Name: ..... Spouse Name: .....

Where do you currently work? .....

How long have you worked there? .....

What does your spouse do for work? .....

Do you have a retirement plan at work? .....

Are you currently contributing to it? .....

Do you and your spouse have any other retirement plans outside of your work? .....

Or do you have 100% of your retirement through your job only? .....

Have you considered any other investment options when it comes to your retirement? .....

If we were able to show you different ways to improve or diversify your retirement portfolio, would that be something you would be interested in? .....

Is it safe to assume that your family is the most important thing in your life? .....

Do you have any life insurance to protect your family? .....

Are you not protecting your family properly because no one has come to show you your options?  
.....

Or is life insurance just something you haven't looked into yet? .....

Do you plan on sending your kids to college? .....

Have you started planning for your kids' college education? Have you started any kind of plan for their future?  
.....

If there was a way where you could save for their college education and start saving for their future in an affordable way, you would want to at least know what your options were, wouldn't you?  
.....

Do you see yourself retiring at your current job? Or do you see yourself making more income by maybe doing something else? .....

Have you ever thought about owning your own business? .....



**UBUNEX**

# 20 WAYS WE CAN HELP YOU

Name: ..... Date: .....

## CHECK AT LEAST 5 AREAS THAT WE CAN HELP YOU AND YOUR FAMILY WITH TODAY:

1. Give you a world-class financial education
2. Teach you how to save money in the right places
3. Achieve higher rates of return on your money
4. Give you guarantees on your money and lock in your gains
5. Show you how to put more money in your current paycheck
6. Help you properly protect your family and assets
7. Set up a guaranteed lifetime income stream (Personal Pension Plan)
8. Replace your income with living benefits and long-term care
9. Set up an estate plan, living trust and will to avoid probate
10. Get you out of debt and keep you out of debt
11. Set up the same plan that the wealthy use to send their kids to college
12. Teach you how to become your own bank
13. Take advantage of a free signing bonus on your retirement money
14. Help you set up a tax-free retirement
15. Upgrade your life insurance plan for free, if you're eligible
16. Determine your financial independence number
17. Help save money on taxes for individuals and business owners
18. Show you how to make an extra \$6-Figure income part-time or \$7-Figure income full-time
19. Help transfer wealth to your next generation and leave a significant legacy for your family
20. Take advantage of a free financial plan

## WHO DO YOU LOVE AND CARE ABOUT THAT YOU WOULD LIKE TO HELP GET AHEAD FINANCIALLY?

1. Name: ..... Relationship: ..... Phone: .....
2. Name: ..... Relationship: ..... Phone: .....
3. Name: ..... Relationship: ..... Phone: .....

**UBUNEX**

# PERSONAL FINANCIAL REVIEW

## THE 5 MAGIC QUESTIONS

1. At what age would you like to retire? .....
2. How much money would you like to have saved total, when you do retire? .....
3. How much income per month would you like to live on for the rest of your life in retirement? .....
4. What are some of your big goals and dreams in retirement? .....
5. If we can put together a plan to show you how to accomplish all of your dreams and goals in retirement, wouldn't that be something you would want to take advantage of? 

Yes	No
-----	----

## HOW MUCH MONEY CAN YOU COMFORTABLY PUT ASIDE EACH MONTH TO REACH ALL OF YOUR DREAMS AND GOALS IN RETIREMENT?

Check One

\$200	\$500	\$1,000	\$1,500	\$2,500	\$5,000+
-------	-------	---------	---------	---------	----------

## DIME NUMBER

If you want to protect you and your loved ones, you need the right amount of coverage.

Do you want to leave your family debt-free?	Yes	No	Debt:	
Do you want your income to continue coming to your family?	Yes	No	Income x 10:	
Do you want to pass on the home or mortgage to your family?	Yes	No	Mortgage:	
Do you want to leave money for your kids' college or miscellaneous expenses?	Yes	No	Education:	

*Insurance can take care of all of this for you.*

TOTAL INSURABLE NEED:

TOTAL INSURABLE NEED: