Instructions:
1. Complete all fields
2. To save, select the Print icon in the upper right corner - change printer selection to "Save as PDF"
3. Email to your agent for analysis

Wealth Accelerator Analysis Questionnaire

All Information is Required **DATE:**

Name:		Spouse:	
Best Contact Telephone #:		Email Address:	
Home Address:	City:	State:	Zip:

INCOME INFORMATION:

Gross Income (Yearly):_____	***Spouse Gross Income (Yearly):_____***
Net Income Per Pay Check:	**Net Income Per Pay Check:**
How often do you get paid?	**How often do you get paid?**
Next pay date:	**Next pay date:**
Other Income (Who, how much, when?):	Other Income (Who, how much, when?):
Current Social Security Income/Pay Date:	Current Social Security Income/Pay Date:
Current Pension/ Pay Date:	Current Pension/ Pay Date:
Discretionary Income (Income that you have left at the end of each month after paying all expenses):	

LIABILITIES: (Credit Cards, Auto, Education, Boat and Home Equity Loans, etc.)

TYPE OF ACCT.	*COMPANY*	*START DATE (MONTH/YEAR*	*STARTING BAL.*	*CURRENT BAL.*	*MIN. PAYMENT*	*INTEREST RATE*	*TERM (months)*	*PAYMENT DATE*

CURRENT MORTGAGE INFORMATION: **(Primary Home)**

Name of Lender:	**Type Loan:**
Home Value:	Purchase Price:
Current Term:	Start Date (Month/Year):
Current Mortgage Initial Loan Amount:	Current Balance:
Interest Rate:	Fixed or Variable:
Total Monthly Mortgage Payment (including escrows):	Day of month mortgage is **paid**:

HOME EQUITY LINES AND 2ND MORTGAGES

Name of Lender:	2nd Mortgage or HELOC:
Original Term:	Starting Date (Month/Year):
Original Balance/Line Amount:	Current Balance:
Interest Rate:	Fixed or Variable:
Total Monthly Payment:	Day of month paid:
NOTE: For a Home Equity Line of Credit, please include the line amount.	

OTHER HOUSEHOLD EXPENSES: (Groceries, Utilities, Music Lessons, Entertainment, etc.)

TYPE OF EXPENSE	AMOUNT DUE	HOW OFTEN	PAYMENT DUE DATE(S)

If applicable, would you like to use your existing line of credit for the software? ☐ YES ☐ NO

If you have any additional information that you would like for us to review, please include it in the space below: