



## Total Needs Analysis

In order to help you identify which assets to reallocate and how best to reduce and/or eliminate debt, we need an accurate financial picture. Without this, we can't help.

Completing our Total Needs Analysis is a crucial step when it comes to unlocking the door to ultimate financial success. Your answers give us the information we need to better understand your assets and develop a strategy that will make them start working for you – all at no cost to you. It's important that you complete this part of your financial "homework" immediately if you truly wish to *arrive*.

Many of our clients with and without assets in their portfolios often increase their personal and business wealth by leveraging our Global Financial Networks. This can be accomplished when you use OPM (Other People's Money) by simply linking from our website to our Lending Partners who have billions of dollars to lend to our private members.

Think of this form as your homework and remember we are only looking for total numbers. We never ask for private financial information such as Social Security numbers and account numbers. Please print out and complete this Total Needs Analysis form and forward it to our office for review *today* (or at least 24 hours before your appointment).

### GENERAL INFORMATION

<b>Date</b>	
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Your Name	Age	Home Phone	Work Phone	Cell Phone
Spouse/Partner Name	Age	Home Phone	Work Phone	Cell Phone

Street Address	City, State/Province, Zip/Postal Code	Country

Children's Ages	Your Credit Score	Spouse/Partner Credit Score

ANNUAL INCOME	Employment	Investments	Other	Total
Your Income				
Spouse/Partner Income				
<b>TOTAL</b>				

Where do you want to be financially in ....?	
1 Year	
3 Years	
5 Years	

ASSETS					
Investment Vehicle	Current Cash Liquidation Value	Annual ROI (% Yield)	Risk (1-High to 4-Low)	Maturity Date and Early Withdrawal Penalties	
<b>SECURE</b>					
CDs					
IRA, 401K, SEP					
Annuities					
Municipal Bonds					
Stock Options					
Preferred Stock					
Convertible Bonds					
Balanced Funds					
Utilities					
Education Funds					
Real Estate Equity					
Other					
Other					
<b>GROWTH</b>					
Investment Real Estate					
Stocks					
Mutual Funds					
Limited/Equity Partnerships					
Other					
Other					
<b>LIQUID</b>					
Cash on Hand					
Checking Accounts					
Savings					
Treasury Bills					
Cash Value Life Insurance					
Trust/Inheritance					
Other					
Other					
<b>SPECULATIVE</b>					
Art					
Commodities					
Exploration					
Futures					
Gem Stones					
Metals					
Options					
Venture Capital					
Other					
Other					
		<b>Totals</b>	<b>Value</b>	<b>Avg. Interest Rate</b>	<b>Avg. Risk</b>
		Secure			
		Growth			
		Liquid			
		Speculative			
		<b>TOTAL</b>			

## LIABILITIES

Unpaid bills	Due Monthly	Due Annually	Outstanding Balance	Number of Years, Months Remaining	Interest Rate Charged	Is Interest Tax Deductible? (Y/N/?)
<b>PERSONAL</b>						
Home Mortgages						
Vacation Mortgages						
Rents						
Insurance Premiums						
Utilities						
Alimony/Child Support						
Credit Card Balances						
Car Loans						
Education						
Installment Loans						
Margin Accounts						
Home Equity Loans						
Taxes						
Other						
Other						
Other						
<b>BUSINESS</b>						
Business Mortgages						
Business Rents						
Installment Loans						
Equipment Purchases						
Insurance Premiums						
Credit Card Balances						
Taxes						
Other						
Other						
Other						

Totals	Value
Personal	
Business	
<b>TOTAL</b>	

TOTALS	VALUE
<b>Assets</b> (from page 2)	+
<b>Liabilities</b> (from this page)	-
Assets – Liabilities = <b>TOTAL NET WORTH</b>	

Please either scan in the completed document and E-mail it to the Six Figure Club at [Info@SixFigureClub.com](mailto:Info@SixFigureClub.com) or fax it to us at (703) 880-9496.

Affiliate Name	Affiliate ID Number	Phone	E-mail