Mentor . . . is your conduit to get to it ! Your KEY . . . to unlimited success !

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

Date	

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				
TOTAL				

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
SECURE				
CDs				
IRA, 401K, SEP				
Annuities				
Municipal Bonds				
Stock Options				
Preferred Stock				
Convertible Bonds				
Balanced Funds				
Utilities				
Education Funds				
Real Estate Equity				
Other				
Other				
GROWTH				
Investment Real Estate				
Stocks				
Mutual Funds				
Limited/Equity Partnerships				
Other				
Other				
LIQUID				
Cash on Hand				
Checking Accounts				
Savings				
Treasury Bills				
Cash Value Life Insurance				
Trust/Inheritance				
Other				
Other				
SPECULATIVE				
Art				
Commodities				
Exploration				
Futures				
Gem Stones				
Metals				
Options				
Venture Capital				
Other				
Other				

Totals	Value	Avg. Interest Rate	Avg. Risk
Secure			
Growth			
Liquid			
Speculative			
TOTAL			

LIABILITIES						
Unpaid bills	Due Monthly	Due Annually	Outstanding Balance	Number of Years, Months Remaining	Interest Rate Charged	Is Interest Tax Deductible? (Y/N/?)
PERSONAL						
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						
BUSINESS						
Business Mortgages						
Business Rents						
Installment Loans						
Equipment Purchases						
Insurance Premiums						
Credit Card Balances						
Taxes						
Other						
Other						
Other						

Totals	Value
Personal	
Business	
TOTAL	

TOTALS	VALUE
Assets (from page 2)	+
Liabilities (from this page)	-
Assets – Liabilities = **TOTAL NET WORTH**	

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

Affiliate Name	Affiliate ID Number	Phone	E-mail