FIRST INCOME ADVISORS

First Income Advisors Fast Track Quote Sheet

(MUST HAVE ALL ANSWERS)

1. Prospect Names (s)
2. Prospect Date of Birth (s)
3. Amount of Liquid Money in the Bank
   a. CD's
   b. Checking
   c. Savings
4. Amount of Money in Qualified Plans
   a. IRA rollovers
   b. Old 401K
   c. Current 401K
   d. SEP's, Roth's, TSP, 403B, 457
5. When do you plan to retire? Need Age (s)
6. Any non-qualified assets in brokerage/funds/savings bonds.....
7. Real Estate value and debt on each property
8. Life insurance / LTC information
9. Pension
   a. His/her pension info WITH survivorship %
   b. His/her Social Security amounts from benefit statement page
   c. Any other residual income source
10. What are you primary financial concerns? MUST HAVE
11. Approximate Monthly Expense? IN RETIREMENT WHAT DO THEY NEED