



Proven Strategies on Improving your Financial Picture!

Financial Check-Up Strategies:

Are you Interested in Learning More?

A. Review of your debt situation Yes _____ No _____

B. Analysis of your cash flow and how to improve it Yes _____ No _____

C. Review of your Risk Management Plan Yes _____ No _____

D. Review of your Retirement Plan Yes _____ No _____

E. Looking to buy/sell a house? Yes _____ No _____

F. When does your mortgage renew? **Date / Time** _____
Eg. (01/01/2019), or 7 Months etc.

G. Do you need a Will or update your existing Will? Yes _____ No _____

NAME: _____

Phone: _____

Email: _____

