

## **Financial Questions**

1. Do you have less or more than \$20,000 in your checking/savings? Less More
2. Do you have a 401k? Yes No
3. If you have a 401K, does it produce at least an 8% return? Yes No
4. Have you rolled over your 401K? Yes No
5. Do you have stocks/bonds that produce at least an 8% return? Yes No
6. How many CD's do you have?
7. Are your CD's about to mature? Yes No
8. Do you own your home? Yes No
9. How much do you owe on your home?
10. Do you have life insurance? Yes No
11. Is your life insurance term or permanent
12. Do your children have life insurance or a college fund? Yes No
13. Does your wife have life insurance, a 401K, CD's, or Stocks/Bonds? Yes No

This page is for you to type or write detailed information about your current financial situation. Many of the reasons that people come to GolnsurancePAL for help is that they are unhappy with their current advisor or the financial product that they are currently enrolled in. Some other reasons why people come to GolnsurancePAL are that they are currently losing money, they are not earning enough interest, or they have changed their job and need to roll over their 401K. One of the main reasons people come to GolnsurancePAL is that their annuity does not have an uncapped strategy with very good participation rates. In the area of cash (non-qualified money), we have a product that out performs mutual funds, the stock market, stand alone bonds, and in many cases, you the client would have to be in the market over 50 years with no losses to equal the performance of this product. Your current product would have to average 14% to 16% interest with no downside in the market to equal the performance of this product. Contact GolnsurancePAL for an illustration and one of our GolnsurancePAL Licensed Agents (Guides) will do a presentation on how you can benefit from this program. Please write down whatever your financial situation is on the form and fax it to 1-800-853-2470 or email it to michaelkoushel@goinsurancepal.com who is head of our operations office and he will forward your information to a certified agent that covers your area and we will help you immediately with your financial needs.