



## 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 Term  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

