



MRC – Initial Client Evaluation

Please provide us with the following information in order to perform an initial financial assets analysis.

Contact Information

Name _____ Age _____

Spouse Name _____ Age _____

Address _____

City _____ St _____ Zip _____

Phone: Home _____ Work _____

Spouse Phone _____ Cell _____

Primary Email Address _____

Alt. Email Address _____

Referred by: _____

MRC Education Completed

- MRC Intro Video Phone conversation Webinar Seminar
 Visited MRC website Read Book

Occupation _____ Self-Employed? Yes/No (circle one)

Occupation – (**Spouse**) _____ Self-Employed? Yes/No (circle one)

Annual Income \$ _____

Annual Income – Spouse \$ _____

Life Insurance – Total Death Benefit of all Policies

Primary \$ _____ **Spouse** \$ _____



Contact--What type of Retirement Plan? (check all that apply)

- IRA 401K 403B 457 def. comp. SEP IRA
\$ _____ \$ _____ \$ _____ \$ _____ \$ _____

Invested In: (check one)

- CD's Mutual Funds Stocks/Bonds Annuities

Name of Institution/Custodian _____

Annual / Monthly Retirement Plan Contribution

Per Month \$ _____ Annual \$ _____

Spouse - What type of Retirement Plan? (check all that apply)

- IRA 401K 403B 457 def. comp. SEP IRA
\$ _____ \$ _____ \$ _____ \$ _____ \$ _____

Invested In: (check one)

- CD's Mutual Funds Stocks/Bonds Annuities

Name of Institution/Custodian _____

Spouse - Annual / Monthly Retirement Plan Contribution

Per Month \$ _____ Annual \$ _____

Total Retirement Plan Funds [Contact and Spouse]

Contact \$ _____ Spouse \$ _____

What type of Non-Qualified Savings/Investments? (check all that apply)

- Bank Savings CD's Mutual Funds Stocks/Bonds Annuities

Name of Institution/Custodian _____

Total Amount of N-Q Savings/Investments \$ _____



Real Estate Profile

Estimated **FICO Score** – Above 720?

Yes/No (circle one)

Primary Residence

Est. Value \$_____ Total Sq. Ft. _____

Total Loan Value \$_____ Current % Rate _____

Total P&I \$_____

Loan Type (check one) 30 Yr. 15 Yr. Int. Only Adjustable

Secondary Residence

Est. Value \$_____ Total Sq. Ft. _____

Total Loan Value \$_____ Current % Rate _____

Total P&I \$_____ Monthly

Loan Type (check one) 30 Yr. 15 Yr. Int. Only Adjustable

Rental Property – Number of Properties _____

Est. Values \$_____ Total Sq. Ft. _____

Total Loan Values \$_____ Current % Rate _____

Total P&I \$_____ Monthly

Rental Income \$_____ Monthly

Loan Type (check one) 30 Yr. 15 Yr. Int. Only Adjustable

If more room is needed, please attach an additional Rental or Commercial Property Schedule