

Free Bank On Yourself® Analysis and Recommendations Request Form

(Please fill out and return today to ensure a timely meeting with a Bank On Yourself Professional)

- Please have a Bank On Yourself Professional contact me as soon as possible so I can receive my FREE No-Obligation Analysis that will show me how Bank On Yourself could help me reach my short-term and long-term goals as quickly as possible.

Name: _____
(Please use black ink for readability)

Address: _____

City: _____ State: _____ Zip: _____

Daytime Phone: _____ Evening Phone: _____

Primary Email Address: _____

Best time to call to speak briefly with me during business hours: _____

How did you hear about Bank On Yourself? _____
(If you learned about it from someone, please list their name and state)

NOTE: We never trade, rent, sell, or abuse your contact or other personal information. We ask for email and phone to make it easy to put you in contact with the Bank On Yourself Professional we refer you to, who will prepare your Analysis. By giving us this information, you authorize Bank On Yourself and a Bank On Yourself Professional to contact you regarding your Analysis.

Signature (required) _____ Date: _____

Please check your top 2 or 3 financial concerns:

- | | |
|--|---|
| <input type="checkbox"/> Growing my nest-egg safely and predictably, <i>regardless</i> of what's happening in the stock or real estate markets | <input type="checkbox"/> Recapture interest charges I now pay to financial institutions |
| <input type="checkbox"/> Retirement income I can predict and count on/guaranteed lifetime income | <input type="checkbox"/> Pay for college tuition without going broke |
| <input type="checkbox"/> Access to money on my own terms when I need it | <input type="checkbox"/> Other: _____ |

Please tell us a little more about yourself so the Bank On Yourself Professional we refer you to can be better prepared to help you. (Don't worry if you don't have this information handy.) **This information will be kept in strictest confidence:**

Your Age: _____ Spouse or Significant Other's Age: _____

Your Occupation: _____ Spouse or Significant Other's Occupation: _____

Your Annual Income: _____ Spouse or Significant Other's Income: _____

Do you own your home? Yes No Approximate mortgage balance: _____ Years remaining: _____

Approximate total credit card debt: _____ At what interest rate? _____

Ages of children living at home: _____ What is your total monthly payment for your cars? _____

Do you own a business? Yes No Are you (or your spouse) licensed to sell life insurance? Yes No

Here's How to Arrange for Your Free Bank On Yourself Analysis and Recommendations:

1. Fax this form to **505-466-2167** anytime (NO cover sheet necessary)
2. Return this form by mail to: **Bank On Yourself, 903 W. Alameda St., #526, Santa Fe, NM 87501-1681**
3. For fastest response, request your Analysis online at www.BankOnYourselfFreeAnalysis.com