

WHO WE ARE:



YOUR MORTGAGE PROTECTION SPECIALIST IS:



MUTUAL of OMAHA



WHAT WE DO:



Mortgage Protection

Do you have a plan to pay your mortgage in the event of your death? Don't lose your family's most valuable asset due to poor planning.



Life Insurance

How much coverage is enough? Make sure your family is protected with enough coverage to provide for them when you are gone.



Future Income Planning

Are you concerned with market volatility? There is a little known secret to keep your money safe during market corrections.



Mortgage amt: _____ Mortgage Term : 15yr 20yr 30yr
House value: _____ Monthly payment: _____
Do you pay extra toward mortgage to pay off loan early? Y or N
How much money do you put into a savings each month? _____

3 objectives - (affordable - comfortable - see if you qualify)

Name:
Occupation:
Monthly:

Name:
Occupation:
Monthly income:

Medications

What for?
Surgeries?
Heart attack, Stroke, Cancer?

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What do you have to offset the cost of the mortgage when you die?

401k? IRA? STOCKS? BONDS? MUTUAL FUNDS? C.D.'S? SIGNIFICANT SAVINGS?

Do you have life insurance? How much? With who?

IF YOU WERE TO DIE LAST WEEK WHAT DOES THE CURRENT PLAN LOOK LIKE?

Based on your current situation, here are the three most effective strategies:

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We can't decide right now but if you were to qualify which option would be the most comfortable for you?