

# Free Bank On Yourself<sup>®</sup> Analysis and Solution Request Form

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

Please have a Bank On Yourself Authorized Advisor 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 \_\_\_\_\_

If you were referred by a financial advisor, please list their name and state: \_\_\_\_\_

NOTE: we never trade, rent, sell, or abuse your contact or other personal information. We ask for e-mail and phone to make it easy to put you in contact with the B.O.Y. Authorized Advisor we refer you to, who will prepare your analysis. By giving us this information, you authorize B.O.Y. and a B.O.Y. Advisor to contact you regarding your analysis.

Signature (**required**): \_\_\_\_\_ Date: \_\_\_\_\_

Please rate the following areas of concern in order of importance from 1 to 7, with 1 being the *most* important:

- \_\_\_\_\_ Growing my nest-egg safely and predictably, *regardless* of what's happening in the stock or real estate markets
- \_\_\_\_\_ Retirement income I can predict and count on
- \_\_\_\_\_ Access to money on my own terms when I need it
- \_\_\_\_\_ Recapture the money I pay for major purchases
- \_\_\_\_\_ Recapture interest charges I now pay to financial institutions
- \_\_\_\_\_ Pay for college tuition without going broke
- \_\_\_\_\_ Other: \_\_\_\_\_

Please tell us a little bit more about yourself so your Advisor 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:**

	You	Spouse or Significant Other
Age:	_____	_____
Occupation:	_____	_____
Annual Income:	_____	_____

Do you own your home? \_\_\_ Yes \_\_\_ No Approx. 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 Bank On Yourself Analysis:

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. Or request your Analysis online at [www.BankOnYourselfFreeAnalysis.com](http://www.BankOnYourselfFreeAnalysis.com)  
(if you're reading this while you're online, simply click on the link)