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NOTE: We protect your privacy, no DS agents will ask for Account, Credit Card or Social Security numbers. No credit checks will be done. We just need basic information in order to provide you the best analysis possible. This information will NEVER be shared with any other party.

CLIENT INFORMATION (Please Print Clearly)

FIRST NAME			LAST NAME		
PHONE (Preferred)			PHONE (Secondary)		
ADDRESS LINE 1			ADDRESS LINE 2		TIME ZONE
CITY	STATE	ZIP	EMAIL		

MORTGAGES & HELOCS

HELOC?	NAME	ORIGINAL BALANCE	REMAINING BALANCE	CURRENT INTEREST RATE	ORIGINAL TERM MO.	REMAINING TERM MO.	TOTAL PAYMENT INCLUDING ESCROW	AMT TO ESCROW
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THE DEBT SHREDDER WILL ELIMINATE AN UNLIMITED NUMBER OF DEBTS. THE CATAGORIES ARE TO HELP JOG YOUR MEMORY FOR COMPLEX PORTFOLIOS, USE ADDITIONAL SHEETS OR SPEAK TO YOUR DEBT SHREDDER AGENT.

CREDITORS (STUDENT LOANS, CAR LOANS, PERSONAL LOANS, CREDIT CARDS, LOC)

CC	LOAN	PERS. LOC	NAME	CURRENT BALANCE	CREDIT LIMIT	ORIGINAL/REMAINING TERM (MONTHS)	INTEREST RATE	MONTHLY PAYMENT
								Minimum*

*ONE OF THE KEYS TO SUCCESSFUL DEBT ELIMINATION & WEALTH BUILDING IS TO PAY YOUR MINIMUM PAYMENT EACH MONTH & FOLLOW THE PROGRAM PROMPTS FOR STRATEGIC PAYMENTS RATHER THAN PAY EXTRA EACH MONTH.

SCAN & email completed worksheet to harold@hwwalters.com for your FREE ANALYSIS.

The results of the analysis will be based on the accuracy of the information you provide. All data will be kept strictly confidential and used for interoffice processing only. For questions or assistance, you can contact Harold at 717 615 2834

PRIMARY INCOME

ADDITIONAL/SECONDARY INCOME

NAME	NET	INTERVAL	MONTHLY, BI-MONTHLY, SEMI-ANNUALLY, ANNUALLY

BANKING

NAME	CHKG/SAVE	BALANCE	INTEREST RATE	MINIMUM BALANCE	EMERGENCY FUND

MONTHLY LIVING EXPENSES (FOOD, CLOTHING, TRANSPORTATION, ENTERTAINMENT, ETC.)

AGGREGATE MONTHLY EXPENSES	ADDITIONAL ANNUAL EXPENSES (NOT INCLUDED IN MONTHLY EXPENSES)
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YOUR FUTURE GOALS & NOTES

Are you looking to retire early? If so, please provide your current age and when you would like to retire.
 Current Age _____ When Would You Like to Retire? _____

If money was no longer an issue, what would you like to do with your time?

Our current tax structure oftentimes benefits business owners & entrepreneurs. Have you ever considered owning your own business? ____ Yes or ____ No. If so, what would that be?

Emergency Fund: Is there an amount you would like to set aside for emergency situations? \$

Does your employer provide a pension program? _____ Spouse?

Do you have any retirement /pension fund? _____ Spouse?

ADDITIONAL DEBTS, INCOME, EXPENSES OR OTHER INFO

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