

Founders Group, Inc.

4635 Southwest Freeway, Ste. 162 • Houston, TX 77027 • (713) 871-5919 • Fax (713) 425-0346

Prequalification

Date _____

1.0 Personal Data

Name	E-mail	
Address	Home Phone	
City/ State	Office Phone	
Your DOB	Spouse DOB	Cell Phone

2.0 Financial Data

Annual Gross Income H \$_____ W \$_____; **Monthly** Living Expenses \$_____
Total credit card balances \$_____, monthly pmts \$_____
Total other non mortgage balances \$_____, monthly pmts \$_____
How much do you have in your 3 month emergency fund \$_____
Total amount in stocks, bonds, mutual funds, investment real estate (not 401k plans) \$_____

3.0 Retirement

How much are you saving annually in 401k? H \$_____ W \$_____
How much are you saving annually personally? H \$_____ W \$_____
How much are you saving annually in other programs? H \$_____ W \$_____
Age you wish to retire H _____ W _____
Amount of annual retirement income you estimate needed \$_____
How much will you get in pension income annually? H \$_____ W \$_____
Have you visited with a professional advisor to determine what you will really need
for retirement Yes No The amount is \$_____/year
Would you want to find out this answer? Yes No When _____
Would an additional \$1 million help you reach the retirement goal? Yes No

4.0 Mortgage

Do you have a mortgage on your home? Yes No Are you current with it? Yes No
Appraised value of your home \$_____ ; Original mortgage amount \$_____
Original Term: _____ years. Financed or refinanced _____ years ago
Approximately remaining balance \$_____ ; Interest rate _____%
Payments of Principal & Interest only \$_____/month
Do you know your FICO score? Yes No It is = _____
2nd mortgage? \$_____ ; Monthly payments \$_____

5.0 Other

How much are you investing toward college needs, wedding needs, and your parent's needs? \$_____/year

6.0 To build your retirement fund would you?

Sell present home, move to smaller home, to save more? Yes No
Be willing to work extra 20-40/hr/wk? Yes No
Be willing to cut expenses by 30 – 40%? Yes No
Consider using mortgage payments to build a \$1mm & retirement fund without sacrificing
your present lifestyle? Yes No

Presentation of the educational mortgage program, support work, input time and negotiations will be charged at \$250.00 per hour. However, if this form is returned by _____, the hourly fee rate will be \$125 per hour. In addition, if your mortgage program is funded through our affiliate, you will be reimbursed in full for your charges. If this form is returned after _____, then, you will be charged at the full standard hourly rate plus out of pocket expenses.

I authorize *FOUNDERS GROUP* to charge my credit card for financial consultation services (MUST BE COMPLETED)

Visa/MasterCard/Discover/AmExp Exp. Date _____ Account #: _____

Signature: _____ Print Name: _____