

Turning the Tides on the Traditional Banking Systems

Infinite Banking Concept Intake Form

Head of Household Information

Income Information

Monthly Income: Additional Income:

Existing Life Insurance

Death Benefits Premiums Cash Values

Spouse Information

Income Information

Monthly Income:

Existing Life Insurance

Death Benefits Premiums Cash Values

Assets

Savings Stocks Mutual Funds IRA's
401k 401k Monthly Contribution:
Additional Assets: Additional Assets:

Debts

Home Mortgage(s)

Home and Property Value:

1ST MORTGAGE

Balance: Monthly Payment: Interest Rate: Loan Length: (years)

2ND MORTGAGE

Balance: Monthly Payment: Interest Rate: Loan Length: (years)

Credit Cards

CREDIT CARD 1:

Balance: Minimum Payment: Actual Payment: Interest Rate:

CREDIT CARD 2:

Balance: Minimum Payment: Actual Payment: Interest Rate:

CREDIT CARD 3:

Balance: Minimum Payment: Actual Payment: Interest Rate:

CREDIT CARD 4:

Balance: Minimum Payment: Actual Payment: Interest Rate:

CREDIT CARD 5:

Balance: Minimum Payment: Actual Payment: Interest Rate:

Vehicles

VEHICLE #1

Make: Model: Year:
Balance: Monthly Payment: Interest Rate: Loan Length: (in years)

VEHICLE #2

Make: Model: Year:
Balance: Monthly Payment: Interest Rate: Loan Length: (in years)

VEHICLE #3

Make: Model: Year:
Balance: Monthly Payment: Interest Rate: Loan Length: (in years)

Additional Debts

Type: Balance: Monthly Payment: Interest Rate:

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