

## Mentor Services Unlimited -- New Member Financial Resume Profile -- Total Needs Analysis

This survey clarifies your interest in and ability to participate in Mentor's programs. Please accurately complete this form **before** our scheduled appointment. This information will best help us guide you in achieving your personal and business financial income goals.

Today's date: \_\_\_\_\_

Person 1 Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone(H): \_\_\_\_\_ Phone(W): \_\_\_\_\_ Phone(C): \_\_\_\_\_

Person 2 Name: \_\_\_\_\_ Age: \_\_\_\_\_ Phone(H): \_\_\_\_\_ Phone(W): \_\_\_\_\_ Phone(C): \_\_\_\_\_

Address: \_\_\_\_\_ City, St, Zip: \_\_\_\_\_ Children's Ages: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

INVESTMENT VEHICLE	Current Cash Liquidation Value	Annual Int % (Yield)	Risk 1-High to 4-Low	Maturity Date(s) and Early Withdrawal Penalties
<b>SECURE</b>				
C.D.s				
IRA, 401K, SEP				
Annuities				
Municipal Bonds				
Stock Options				
Preferred Stock				
Convertible Bonds				
Balanced Funds				
Utilities				
Home Equity/RE				
Other				
Other				
<b>GROWTH</b>				
Inv. Real Estate				
Stocks				
Mutual Funds				
Lim/Equity Prtnshps				
Other				
Other				

INVESTMENT VEHICLE	Current Cash Liquidation Value	Annual Int % (Yield)	Risk 1-High to 4-Low	Maturity Date(s) and Early Withdrawal Penalties
<b>LIQUID</b>				
Cash-on-Hand				
Checking Accts				
Savings				
Treasury Bills				
Cash Value Life Ins.				
Trust / Inheritance				
Other				
Other				
<b>SPECULATIVE</b>				
Art				
Commodities				
Exploration				
Futures				
Gem Stones				
Metals				
Options				
Venture Capital				
Other				
Other				

TOTALS	Value	Avg. Int %	Avg. Risk #
<b>SECURE</b>			
<b>GROWTH</b>			
<b>LIQUID</b>			
<b>SPECULATIVE</b>			
<b>TOTAL</b>			

ANNUAL INCOME	Employment	Investments	Other	Total
Person 1				
Person 2				
<b>TOTAL</b>				

\*\*\* Mail completed form to address or e-mail below or Fax to: 301.248.2249

Mentor Services Unlimited, LLC. 7708 Locust Lane Fort Washington, MD 20744

Website: [www.mentorservicesunlimited.com](http://www.mentorservicesunlimited.com)

\*\*\*Return to sender after completed\*\*\* Phone: 843.997.1800 E-mail: [info@mentorservicesunlimited.com](mailto:info@mentorservicesunlimited.com)

Please add any additional information here (such as current debts, future expenses, financial & retirement goals, your net worth and wish lists, etc.).

**\*\*\*Return to sender after completed\*\*\***

		<b>TOTAL</b>	
Total assets from the 1 <sup>st</sup> page	Total Expenses	Net Worth	