

<Print on your letterhead>

As a valued client of <Name of Firm>, we are pleased to offer you a complimentary mortgage checkup.

Simply answer the questions below and <Financial Planner/Lending Manager> will contact you to discuss strategies on how you can pay off your home loan faster, as well as ways to start your wealth accumulation straight away.

<Name of Firm> is not only totally committed to assisting our clients achieve financial independence, but to also provide them with debt solution strategies.

Please tick the box as applicable to you.

- I would like your Financial Planner to contact me for a no obligation, free mortgage checkup.
- Yes, I would like to consolidate debts to reduce my total loan repayments.
- Yes, I would like advice on how best to create wealth whilst paying off my mortgage.
- Please show me how I can utilize the equity in my home.
- I am considering buying a property soon, and would like advice on loan structure and competitive finance.
- I would like advice on how to protect my wealth and income

Please complete this form so that we can arrange a mutually convenient time to meet:

Full Name: _____

Phone/Mobile: _____ Fax: _____

Email: _____ Best time and preferred contact method: _____

My Current Home Loan Balance Is \$ _____ Interest Rate: ____ % Lender: _____

I pay \$ _____ fortnightly/ monthly

Estimated value of my home/ investment property is: \$ _____

This service is provided by our specialist, <Financial Planner/Lending Manager>, who will contact you at your requested time.

Please return this form to <Receptionist or Adviser Name>, via fax/email <Insert Contact Details>.

Best Regards,