

THE FREEDOM COACH

www.FTAMG.com

Post Questionnaire/Survey

D.R.E.A.M. TEST

Date: _____ Invited By: _____

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Home Telephone: _____ Work Phone: _____

Cell Telephone: _____ Email: _____

Best time to call: _____ a.m. /p.m. Occupation: _____

Financial and Savings Information:

Do you shop online? Yes No Take Vacation Yes No

Married: Yes No Children: Yes No

Homeowner: Yes No Your Age: Under 25 25-40 40+

Checking Account: Yes No Credit/Debit Card: Yes No

Is earning additional income and paying off debt important to you? Yes No

Financial Strategy Opportunity:

Yes, I am interested (Financial Independence Options)

My Major Area of Interest is in: (rank all that apply 1-10) Save on Travel, Vacation, & Online Shopping

Credit Improvement (credit repair) Save & Invest Money Identity Theft

Buy Home/Property/Refinance Reduce Taxes Income Insurance Protection

Increase Cash Flow Reducing Debt Estate Planning

Financial and Saving Presentation Request:

Yes, I would like a complimentary financial presentation to determine which saving program is best for me to achieve my personal goals.

Comments: (What part did you like most about the meeting?)

Completed by management
Follow-Up Interview

Day: _____

Time: _____

Date: _____

List 1 person who you feel would benefit from hearing the information.

1. Name: _____ Ph. () _____