

Fact Finder

Date: _____

Personal and Family Information

| | Name | Date of Birth | Social Security No. | E-Mail Address |
|----------|-------|----------------|---------------------|----------------|
| Client | _____ | ____/____/____ | _____ | _____ |
| Spouse | _____ | ____/____/____ | _____ | _____ |
| Children | _____ | ____/____/____ | _____ | _____ |
| | _____ | ____/____/____ | _____ | _____ |
| | _____ | ____/____/____ | _____ | _____ |
| | _____ | ____/____/____ | _____ | _____ |

Residence Information

Street Address: _____

City, State, Zip: _____ Telephone No: _____

Own? Mortgage Payment: \$ _____ Mortgage Balance: \$ _____

Rent? Monthly Rent: \$ _____

Professional Advisor Information

Client's Will (if applicable): Date _____ Type _____

Spouse's Will: Date _____ Type _____

Client's Trust: Date _____ Type _____

Spouse's Trust: Date _____ Type _____

Attorney's Name: _____ Phone No.: _____

Accountant's Name: _____ Phone No.: _____

Employment/Income Information

| | Client | Spouse |
|-------------------|--------|----------|
| Occupation: | _____ | _____ |
| Employer: | _____ | _____ |
| Business Street | _____ | _____ |
| Address: | _____ | _____ |
| City, State, Zip: | _____ | _____ |
| Phone Number: | _____ | _____ |
| Fax Number: | _____ | _____ |
| E-Mail Address: | _____ | _____ |
| Annual Income: \$ | _____ | \$ _____ |
| Other Income: \$ | _____ | \$ _____ |

| Financial Information | | | |
|--------------------------------------|-----------------|------------------------------------|-----------------|
| Assets | | Liabilities | |
| Savings | \$ _____ | Installment Loans | \$ _____ |
| Investments | _____ | Mortgage(s) | _____ |
| IRA(s) | _____ | Charge Accounts | _____ |
| Real Estate | _____ | Credit Cards | _____ |
| Business Interests | _____ | Personal Notes | _____ |
| Personal Property | _____ | Business Debt | _____ |
| Other Annuities | _____ | Other | _____ |
| CDs | _____ | | |
| Mutual Funds | _____ | | |
| Pensions | _____ | | |
| Other | _____ | | |
| Total Assets | \$ _____ | Total Liabilities | \$ _____ |
| Monthly Systematic Savings: \$ _____ | | Average Monthly Expenses: \$ _____ | |

| Insurance Information | | | | | | |
|-----------------------------|---------|-----------------|------------------|-----------------|----------------|-------------|
| Life Insurance | | | | | | |
| Insured | Company | Policy Number | Policy Date | Face Amount | Annual Premium | Beneficiary |
| | | | | \$ _____ | \$ _____ | |
| | | | | \$ _____ | \$ _____ | |
| | | | | \$ _____ | \$ _____ | |
| | | | | \$ _____ | \$ _____ | |
| | | | | \$ _____ | \$ _____ | |
| Other Insurance | | | | | | |
| Monthly Disability Benefit: | | Client \$ _____ | | Spouse \$ _____ | | |
| Health Insurance: | | Client _____ | | Spouse _____ | | |
| P&C Expiration Dates: | | Auto _____ | Homeowners _____ | Other _____ | | |

| Planning Priorities | | | | |
|-------------------------------------|-------|--------|-------|-------|
| | High | Medium | Low | None |
| Protecting Family's Lifestyle | _____ | _____ | _____ | _____ |
| Protecting Income | _____ | _____ | _____ | _____ |
| Providing Education Funds | _____ | _____ | _____ | _____ |
| Implementing Savings Plan | _____ | _____ | _____ | _____ |
| Planning for Retirement | _____ | _____ | _____ | _____ |
| Minimizing Estate Shrinkage | _____ | _____ | _____ | _____ |
| Planning for Business Continuation | _____ | _____ | _____ | _____ |
| Lower Income Taxes | _____ | _____ | _____ | _____ |
| Hedge Inflation | _____ | _____ | _____ | _____ |
| Peace of Mind | _____ | _____ | _____ | _____ |
| Assure Proper Disposition of Assets | _____ | _____ | _____ | _____ |
| Increase Current Income | _____ | _____ | _____ | _____ |
| Other: _____ | _____ | _____ | _____ | _____ |

Please provide accurate and complete information. This Fact Finding Form is intended only as a tool to collect information to assist the agent and client during the sales process. It is not a form required by Midland National Life. Additional information may be needed prior to the purchase of an insurance product.