

Free Business Owner Analysis and Solution Request Form

(Please fill out and return *today* to ensure a timely meeting
with a Bank On Yourself Authorized Advisor)

- Please have a Bank On Yourself Authorized Advisor contact me as soon as possible, so I can receive my FREE No-Obligation Analysis that will show me how Bank On Yourself could help me reach my short-term and long-term business and personal goals as quickly as possible.

Name (please use black ink for readability) _____

Company Name _____

Address _____

City _____ State _____ Zip _____

Daytime Phone _____ Evening Phone _____

Primary Email Address _____

Best time to call to speak *briefly* with me, during business hours _____

If you were referred by a financial advisor, please list their name and state: _____

NOTE: we never trade, rent, sell, or abuse your contact or other personal information. We ask for e-mail and phone to make it easy to put you in contact with the B.O.Y. Authorized Advisor we refer you to, who will prepare your analysis. By giving us this information, you authorize B.O.Y. and a B.O.Y. Advisor to contact you regarding your analysis.

Signature (**required**): _____ Date: _____

Please rate the following areas of concern in order of importance from 1 to 5, with 1 being the *most* important:

- _____ Access to money on my own terms when I need it
_____ Recapture the money I pay for major purchases
_____ Retirement income I can predict and count on
_____ Attract and reward key employees
_____ Other: _____

Please tell us a little bit more about yourself so your Advisor can be better prepared to help you. (Don't worry if you don't have this information handy.)

This information will be kept in strictest confidence:

Marital Status: _____ Your age: _____

What does your business do? _____

Number of employees: _____ Approximate Gross Annual Revenue: _____

Approximately how much do you spend annually to lease or finance business equipment and office buildings? _____

Type of business entity: S-Corp C-Corp Sole Prop. LLC Other _____

Are you (or your spouse) licensed to sell life insurance? _____ Yes _____ No

Here's How To Arrange For Your Analysis:

1. Fax this form to **505-466-2167** anytime (no cover sheet necessary)
2. Return this form by mail to: **Bank On Yourself, 903 W. Alameda St. # 526, Santa Fe, NM 87501-1681**