



# Debt Questionnaire

Agent Name

NAA#

Cell #:

Debt creates servitude; an obligation that limits your capabilities to use your hard-earned money effectively. Take a few minutes to let us help you get started on a journey to a debt-free life where your money becomes your own to spend and save. You can finally be free from the chains of paying everyone but yourself. Fill out the form below and answer a few questions for us. We can help you get started on a road to debt freedom and financial success!

Name		Email:		State of Residence:		Cell #:	
Name		Email:		State of Residence:		Cell #:	

Types of Debt	Total Debt(s) Owed	Mo. Payment	Interest Rate	Late Payments		How Do You Make Payments?
				Yes	No	Mail? On-Line?
Credit Card (include CC company name)			<input type="text"/> %	Yes	No	Mail? On-Line?
Credit Card (include CC company name)			<input type="text"/> %	Yes	No	Mail? On-Line?
Credit Card (include CC company name)			<input type="text"/> %	Yes	No	Mail? On-Line?
Store Cards (Dillard's, Macy, JCP, etc)			<input type="text"/> %	Yes	No	Mail? On-Line?
Gas Cards (Shell, Mobil, U76, Arco)			<input type="text"/> %	Yes	No	Mail? On-Line?
Personal Bank Loans			<input type="text"/> %	Yes	No	Mail? On-Line?
Student/Education Loans (Federal)			<input type="text"/> %	Yes	No	Mail? On-Line?
Student/Education Loans (Private)			<input type="text"/> %	Yes	No	Mail? On-Line?
Business Loans			<input type="text"/> %	Yes	No	Mail? On-Line?
Tax Debt (Owe the IRS?, we can help!)			<input type="text"/> %	Yes	No	Garnishments or Liens? Yes No
Mortgage Loans			<input type="text"/> %	Yes	No	Mail? On-Line?
Car Loans			<input type="text"/> %	Yes	No	Mail? On-Line?

Do you have debt owed with collectors?	Yes No Amnt:\$	Do you have a financial planner?	Yes No
Are you saving money each month?	Yes No	Amount saved monthly?	\$
Annual Income? (Cite both incomes if dual)	\$ Dual Income	Life insurance? Yes No Death Benefit? \$	\$ Monthly Premium
Do you receive tax return income?	Yes No	Average Tax Return Annually?	\$
Do you have a retirement plan?	Yes No	Type of Retirement Accounts? (Type: 401k, 457b, 503b, R.E., etc.)	
Where do you currently do your banking?			

Thank you for your time, we appreciate your answers. **Please email this form to [fixmydebt@naaleads.com](mailto:fixmydebt@naaleads.com)** and we will contact you shortly with options to reduce or eliminate your debt and increase your cash flow. We will be contacting you shortly with options to reduce or eliminate your debt and increase your cash flow. Questions? Please contact the representative that sent you this form for further assistance.

**DISCLAIMER** This questionnaire is provided to you by National Agents Alliance ("The Alliance"). We value our customers and your trust in us, especially when you share your personal information with The Alliance. We understand that privacy and security of personal information is important. We call this information "data." The types of data we collect and share are used to determine the best products or service that will assist you with your financial goals. The Alliance websites, applications, Terms of Use, and Privacy Statements provide additional detail on the treatment and handling of data when interacting with our company, websites, or applications. If your relationship with us were to end, we will continue to handle your data in accordance with this notice. Please refer to our full privacy policy by going to our website at: <https://www.naaleads.com/privacy-policy> -Thank you