

Debt Elimination / Wealth Accumulation Intake

Agent/Advisor Kim Slidmore

Date 9/28/20

Client Name Gianina Pellegrini

Age 41

Client Name _____

Age _____

Resident City/State Richard CA

Own or Rent

Ages of Children _____

Net income Gross 80,000 salary \$3000 for teaching class
annual annual

Debt Breakdown (Include **Mortgage P&I only**, Student loans, Autos, Credit Cards, etc)

Creditor	Balance total	Min. Mth Pymt	Actual Pymt	Int Rate %
<u>Credit cards</u>	<u>10,000</u>	_____	_____	_____
<u>Student loan</u>	<u>200,000</u>	_____	_____	_____
<u>1st Mortgage</u>	<u>80,000</u>	_____	_____	_____
<u>2nd Mortgage</u>	<u>250,000</u>	_____	_____	_____
<u>Auto loan</u>	<u>???</u>	_____	_____	_____

Life Insurance

Carrier	Death Benefit	Cash Value	Premium	Term
<u>N/A</u>	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Retirement Funding

Plan	Monthly Contribution	Balance	Notes
<u>N/A</u>	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Health & Notes

Good & had pre-existing condition but clear now
Had pre-cancerous cells about 15 yrs ago
Had prior bankruptcy about 10-13 yrs. ago