



What if you had a Dream Team of Financial Planners and Advisors working for you? Do you think you'd have a higher net worth? Do you think you'd be further along the road to financial freedom? QuadWealth understands the net worth secrets of the wealthiest Americans and can show you how to implement their strategies.

QuadWealth.com is a wealth management, consulting firm consisting of expert financial planners, attorneys, accountants, tax advisors and real estate specialists. We teach people how to make money and store money through four different parts: real estate investment, advanced financial planning, advanced mortgage planning and strategic debt management. We also teach our clients how to measure their investments against our five tests:

- 1) Safety
- 2) Liquidity
- 3) Rate of Return
- 4) Tax Efficiency
- 5) Retirement Income Generation

Our QuadWealth investment strategies & executive team of advisors can help you:

- ü Earn over 100% in annual returns from real estate investments
- ü Employ \$100,000 of your home's equity to generate over \$1,000,000 in future retirement income and additional net worth
- ü Reposition existing retirement funds into an environment that will generate up to 300% more retirement income with the same investment dollars
- ü Utilize investments that safeguard your money and consistently average over 9% in TAX FREE returns

If you are interested in learning more about the QuadWealth philosophy, and if you would like to see if our strategies are right for you, please fill out the following wealth management questionnaire. You may fax it back to our office at (888) 890-5823. Upon receipt of your completed questionnaire, we will be excited to schedule your first meeting with Jeremy Louder or Jeff Brown, managing partners of QuadWealth.com

"This company can be summarized in one word- Brilliant! I have worked with some of the best financial planning firms around and I have never seen a company that is as good as QuadWealth.com. Their strategies are untouchable!" - James Z.

"Finally, someone is speaking to the real issues of investing and how to properly save for retirement." - Jon S.

"The QuadWealth.com team is phenomenal. The 4 areas of QuadWealth.com are incredibly powerful and uniquely designed. I have finally surrounded myself with a group of advisors who are ALL on the same page and going in the same direction." - Susan A.

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## Wealth Management Questionnaire

Please fill out this questionnaire and fax it back to (888)890-5823. If you have any questions, please call us at 214.780.0100 or visit us online at [www.QuadWealth.com](http://www.QuadWealth.com).

How did you hear about us? \_\_\_\_\_ Date: \_\_\_\_\_

In what area(s) of our Wealth Management System are you most interested? (circle all that apply)

Financial Planning      Mortgage Planning      Debt Management      Real Estate Investment

Do you currently have an experienced: (check all that apply)

Financial Planner? \_\_\_\_\_ Mortgage Planner? \_\_\_\_\_ Attorney? \_\_\_\_\_ Accountant? \_\_\_\_\_

Have you ever invested in real estate? (yes or no) \_\_\_\_\_

Do you currently have any life insurance? \_\_\_\_\_ Does your policy have any cash value? \_\_\_\_\_

Client

Married/ Divorced/ Single \_\_\_\_\_

Name \_\_\_\_\_

Birthday \_\_\_\_\_

Credit Rating:    Excellent      Fair      Poor

Bankruptcy? \_\_\_\_\_ Foreclosure? \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home # \_\_\_\_\_

Work # \_\_\_\_\_

Cell # \_\_\_\_\_

Email \_\_\_\_\_

Employer \_\_\_\_\_

Position / Title \_\_\_\_\_

How Long \_\_\_\_\_ Mo. Income \_\_\_\_\_

401k Balance \_\_\_\_\_ IRA Balance \_\_\_\_\_

Stock Value \_\_\_\_\_ Mutual Fund Bal \_\_\_\_\_

Annuity Balance \_\_\_\_\_ Misc \_\_\_\_\_

Spouse

Name \_\_\_\_\_

Birthday \_\_\_\_\_

Credit Rating:    Excellent      Fair      Poor

Bankruptcy? \_\_\_\_\_ Foreclosure? \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Home # \_\_\_\_\_

Work # \_\_\_\_\_

Cell # \_\_\_\_\_

Email \_\_\_\_\_

Employer \_\_\_\_\_

Position / Title \_\_\_\_\_

How Long \_\_\_\_\_ Mo. Income \_\_\_\_\_

401k Balance \_\_\_\_\_ IRA Balance \_\_\_\_\_

Stock Value \_\_\_\_\_ Mutual Fund Bal \_\_\_\_\_

Annuity Balance \_\_\_\_\_ Misc \_\_\_\_\_

Home Information

Single Family Residence/ Duplex/ Condo/ Manufactured Home (circle one)

Year Purchased \_\_\_\_\_ Purchase Price: \_\_\_\_\_ Current Value: \_\_\_\_\_

1<sup>st</sup> Mortgage Holder \_\_\_\_\_ Balance: \_\_\_\_\_

Mo. Payment \_\_\_\_\_ Do you Escrow? \_\_\_\_\_ Taxes /yr \_\_\_\_\_

Ins/yr \_\_\_\_\_ Rate \_\_\_\_\_ % Term \_\_\_\_\_ years

Fixed Rate    ARM      Balloon (circle one)

2<sup>nd</sup> Mortgage Holder \_\_\_\_\_ Balance: \_\_\_\_\_

Mo. Payment \_\_\_\_\_ Rate \_\_\_\_\_ % Term \_\_\_\_\_ years

Fixed Rate    ARM      Balloon (circle one)

Special Notes: \_\_\_\_\_

Comments: \_\_\_\_\_