

PowerDownDebt, Inc.

384 Montague City Road Montague City, MA 01376



Debt Snapshot Sheet

Name:	Address:	
City:	State: Zip:	
Email:	Home Phone:	Work Phone:
Gross Monthly Income: \$	(BEFORE taxes)	

<u>Credit</u> Line/Limit	<u>Creditor's Name</u>	<u>Current</u> Balance	<u>Interest</u> <u>Rate</u>	MINIMUM Required Monthly Payment	EXTRA Amount you send monthly (if any)	<u>Type of Loan</u> For mortgages please show <u>MONTHLY amounts –</u> not YTD balances.
	Mortgage:					Principal: Interest: Escrow:

Instructions:

This should include ALL debts you pay on a regular basis such as your mortgage, home equity lines, credit cards, automobile loans, student loans, private loans, business loans etc. - Even if they are auto-drafted from an account.

- 1. Enter the credit limit if you know it We like to get a feel for how your debt is effecting your credit score
- 2. In the Creditors Name column enter the lender's name, (Countrywide, MBNA, Amex, etc.)
- 3. Next enter the current total payoff amount. This can be an estimate for now if necessary.
- 4. Enter the annual interest rate. Even 0% loans should be included. Please tell us about any "teaser rate" terms on credit cards etc.
- 5. Enter ONLY the minimum monthly payment you are required to make. Any extra payments should be included in the next column.
- 6. Enter the type of loan, i.e. mortgage, home equity line, automobile, credit card, student loan etc
- 7. Use an additional sheet if necessary. Just fax back to 866-733-4057. We'll take it from there.

NOTE: If you would prefer for us to complete this information, just submit your recent statements of all accounts and we will do the rest.



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384 Montague City Road Montague City, MA 01376 Phone: 413-774-5555 Fax: 866-733-4057



Name:

Date

Estimated Assets

Type of Investment Account Please use second sheet if necessary	<u>Estimated</u> Balance	Interest Rate	Maturity Date if applicable	<u>Notes</u>
Emergency Cash Reserves (Savings account)				
Certificate(s) of Deposit				
Annuities				
<u>Stocks</u>				
Bonds				
Money Market				
<u>401k, 403b, 457 plan</u>				
IRA				
Deferred Compensation				
<u>Other</u>				

Life Insurance

Type of Policy ie. Term, Whole Life	<u>Death Benefit</u>	<u>Cash Value</u>	<u>Annual</u> Premium	<u>Person</u> <u>Covered</u>

This information is extremely helpful in understanding your financial situation comprehensively. It may allow us to lower payments, correct deficiencies, and increase investment efficiency.

All information provided will be kept in strict confidence. Thank you for providing it.