

Borrower

Date of Birth 01 / 26 / 1948

Male Female

Home#



Cellular# ()

Best time to call: 12 a.m. - 6 pm

Allen



Lender: **Confidential**

Loan Amount: \$54,000

Spouse/Co-borrower

Date of Birth 04 / 12 / 1958

Male Female

**The client responded
by filling out and
mailing back the
inquiry we mailed them.**

Reference ID: 22QCZRC

Winnebago



*Available in most states. Limitations may apply. **Not affiliated with any lending institution.** Information obtained through public records. A licensed insurance agent may contact you. Your licensed insurance consultant can help determine your exact qualifications. For more information, contact Equis Financial, Inc. at 866-770-9296. Licensed office located at 83 S Tunnel Rd, Suite A9, Asheville, NC 28805. NC License No. 1000443841, NIPR License No. 17678777.



Important Notice
to David York
Complete and Return

The client responded by filling out and
mailing back the inquiry we mailed
them.



CONFIDENTIAL

Loan Amount: \$363,298

To Borrower:

David [REDACTED]
[REDACTED]
Crystal Lake, IL 60012-3652



Dear David [REDACTED]

You are entitled to participate in our low cost **Mortgage Protection Life Insurance** program, which can protect your \$363,298 loan in case of an unexpected tragedy. Without this plan your family would still have to make your monthly mortgage payments. See Below - plan can include a choice of Life and/or Disability income benefits.

David York, your benefits can include:

- DEATH BENEFIT** - Pays off your \$363,298 loan in the event of your death from Accidental or Natural Causes
- DISABILITY** - Pays your Mortgage Loan payments if you become sick or injured & cannot work
- UNEMPLOYMENT** - Makes your premiums in case of job loss* (Available in most states)
- MONEY BACK OPTION** - Returns your premiums if the benefits are not used by the end of the mortgage term
- KNOWING YOUR FAMILY WILL NOT LOSE THEIR HOME**

For complete details at no cost or obligation please complete and return this form in the enclosed postage paid envelope.

Borrower

Date of Birth 12 / 8 / 75

Male Female

Home [REDACTED] Cellular# () Same

Best time to call: Any time

Spouse/Co-borrower

Date of Birth 6 / 8 / 76

Male Female

Reference ID: 990Q4H8

Lender: Confidential
Loan Amount: \$363,298

McHenry



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The client responded via the internet to an inquiry we mailed them.

Online Lead Template – This Individual Responded Online

**Important Notification:
Please Complete and Return**

Current Information	Requested Changes
Chi Ping [REDACTED]	
[REDACTED]	
Maybe MI 48159-9677 (Monroe County)	
A Best Financial Corporation	
\$313,500	

As a "Mortgage Holder" you may qualify to participate in a low cost **No Physical Exam** Mortgage Life & Disability Insurance Plan. A Mortgage Life Plan can protect your loan in case of an unexpected tragedy. **Without a Plan, your family would still have to make the monthly mortgage payments.** By acting now

- **Death** – Designed to pay off your mortgage or equity loan in the event of your death.
- **Disability** – Can make your mortgage payments if you cannot work due to an illness or injury.
- **Level Premium** – Premium payments that remain level and do not increase.
- **Return of Premium** – Can return all of your premiums if benefits are not used.

For complete details at no cost or obligation, simply complete and return this **ENTIRE** form in the enclosed postage-paid envelope. A licensed insurance agent will contact you to discuss the best ways to protect your family and home.

Borrower	Co-Borrower/Spouse
Date of Birth: 8/6/1965	Date of Birth:
Gender: M	Gender:
Home Phone #: [REDACTED]	Work Phone/Cell #: [REDACTED]
Best Time To Call: Evening	Call At: Work/Cell
Contact Person: [REDACTED]	Email: [REDACTED]
Height:	Height:
Weight:	Weight:
Smoker:	Smoker:
Comments:	

R000057797

After receiving our inquiry in the mail the client called a telephone number and went through 4min of voice prompts to enter in their information.





CURRENT INFORMATION

Name: Reyes [REDACTED]

Mortgage Amount: \$73150

Address: [REDACTED]

Record Date: 4/10/2019 2:30:00 PM

City, State, Zip: Rockford, IL, 61108-3839

Mortgage Balance:

Mortgage Lender: Confidential

Mortgage Payment:

BORROWER

CO-BORROWER

Name: Reyes [REDACTED]

Name:

Age: 29

Phone #: [REDACTED]

Age:

Phone#:

Health Condition: No

Health Condition:

Smoker: Yes

Smoker:

MEDICAL INFORMATION

Medication(s) (Past 15 years):

Medication(s) (Past 15 years):

Medication: _____

Medication: _____

Dosage/Frequency: _____

Dosage/Frequency: _____

Medication: _____

Medication: _____

Dosage/Frequency: _____

Dosage/Frequency: _____

Medication: _____

Medication: _____

Dosage/Frequency: _____

Dosage/Frequency: _____

Hospitalizations (Past 2 Years): _____

Hospitalizations (Past 2 Years): _____

FINANCIAL INFORMATION

Income Source(s)

Income Source(s)

& Monthly Income: _____

& Monthly Income: _____

TOTAL COMBINED MONTHLY INCOME

CURRENT LIFE INSURANCE

Coverage: _____

Coverage: _____

COVERAGE OPTIONS

Coverage Amount: 1 _____

2 _____

3 _____

