

Name _____ Address _____ City State And Zip Code _____ Home Phone _____ Office Phone _____ Introduced By: _____	MANAGEMENT PROFILE Interviewed By: _____ Date: _____ Comments: _____ _____ _____ Next Step: _____
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Age <i>Check only One</i>	Under 25 <input type="checkbox"/>		Over 25 <input type="checkbox"/>	
Employment <i>Check only One</i>	Unemployed Student <input type="checkbox"/>	Clerk Blue Collar <input type="checkbox"/>	Executive Supervisory <input type="checkbox"/>	Sales Prof. Self-Employed <input type="checkbox"/>
Length of Employment <i>Check only One</i>	1 Mo – 11 Mos. <input type="checkbox"/>	12 Mos- 23 Mos <input type="checkbox"/>	24 Mos-59 Mos <input type="checkbox"/>	Over 5 Yrs <input type="checkbox"/>
Marriage <i>Check only One</i>	Single <input type="checkbox"/>	Divorced <input type="checkbox"/>	3 Yrs. Or Less <input type="checkbox"/>	Over 3 Yrs. <input type="checkbox"/>
Dependents <i>Check only One</i>	Spouse Only <input type="checkbox"/>	Parents Only <input type="checkbox"/>	5 or more Dependents <input type="checkbox"/>	2 to 4 Dependents <input type="checkbox"/>
Life Insurance (personally owned- no group) <i>Check only One</i>	Less than \$5000 <input type="checkbox"/>	\$5001 - \$15000 <input type="checkbox"/>	\$15001- \$25000 <input type="checkbox"/>	Over \$25000 <input type="checkbox"/>
Actual Monthly Expenses <i>Check only One</i>	Under \$1000 <input type="checkbox"/>	\$1000- \$1499 <input type="checkbox"/>	\$1500- \$1999 <input type="checkbox"/>	Over \$2000 <input type="checkbox"/>
Estimated Net Worth (incl. Life Ins. CASH VALUES only, NOT face amount) <i>Check only One</i>	\$10000 or Less <input type="checkbox"/>	\$10000- \$19999 <input type="checkbox"/>	\$20000- \$29999 <input type="checkbox"/>	Over \$30000 <input type="checkbox"/>
Education <i>Check only One</i>	High School <input type="checkbox"/>	High School Graduate <input type="checkbox"/>	Attended College <input type="checkbox"/>	College Graduate <input type="checkbox"/>
Income (last full yr W-2 or 1099) <i>Check only One</i>	Under \$15000 <input type="checkbox"/>	\$15000- \$24999 <input type="checkbox"/>	\$25000- \$34999 <input type="checkbox"/>	Over \$35000 <input type="checkbox"/>