2 Minute Health Check System

2 Minute Mortgage Health Check

| | | AII OK | Needs attention | Urgent! |
|----|---|-------------|--------------------|------------|
| 1. | Are you sure you've got the best mortgage? | Yes | Don't know | No |
| 2. | Do you have sufficient mortgage cover (death & critical illness)? | Yes to both | Death yes CI no | Don't know |
| 3. | Have you recently reviewed your life cover needs? | Yes | Don't know | Not at all |
| 4. | Do you think you will have enough money to repay your mortgage when the time comes? | Yes | Don't know | No |
| 5. | Have you reviewed your mortgage deal recently? | Yes | Don't know | No No |
| 6. | Have you got the right type of mortgage for your needs? | Yes | Don't know | No |

Action Points

| | Completed |
|----|-----------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |