

CLD Financial Group, LLC

dba Credit Counselors USA

P.O. Box 1173, Deerfield Beach, FL 33443

Phone: 800-495-4990 Fax: 800-596-6551 Email: questions@mycreditprogress.com Web: www.debtcreditusa.com

FAX BACK TO: 800-596-6551

Client Consultation & Information Form

Account Executive: _____ Date: _____

Referred By (Name): _____ Office Code: _____

Company _____ Phone#: _____

PLEASE PRINT CLEARLY

Your First Name _____ MI _____

Your Last Name _____ Jr/Sr _____

Current Address _____

City _____ St _____ Zip _____

How long have you been at this address? _____ County where you live? _____

Previous Address _____ City _____ St _____ Zip _____

Any other previous street names: _____

Phone #: _____ Fax #: _____ Cell#: _____

Social Security# _____ - _____ - _____ D.O.B. _____ / _____ / _____

E-mail address: (MANDATORY) _____

Mother's Maiden Name _____

How do you prefer to communicate with your consultant, after the initial phone consultation?

PHONE _____ or EMAIL _____ (Check One)

*****THE FOLLOWING IS INFORMATION NECESSARY TO OBTAIN YOUR CREDIT REPORTS ON YOUR BEHALF. PLEASE FILL IN ALL BLANKS, IF APPLICABLE.**

Do you have a current mortgage, OR one that has been paid off in the past? _____

*What is the lender's name? _____

What is the complete account #? _____

Do you have any car loans or leases (present or past)? Yes / No (If "Yes," please list them below)

Car #1: Year _____ Make _____ Model _____

*What is/was the lender's name? _____

Complete account # _____

Exact monthly payment \$ _____

Car #2: Year _____ Make _____ Model _____

*What is/was the lender's name? _____

Complete account # _____

Exact monthly payment \$ _____

****All clients must provide a credit card for the purchase of all three-credit reports, if we can't get your credit report for free (\$25.00 for three reports from Experian, Equifax & TransUnion).**

Payment by Credit Card Option: Visa / MasterCard / Discover / AMEX (circle one)

Name on the Account _____
3 Digit Security Code _____
(on back of card)

Credit Card Number _____
4 Digit - AMEX Security Code _____
(on front of card)

Expiration Date _____

Billing Address: Same as Home - Yes / No

Billing Address Other: _____

CHECK BY FAX: Please attach a voided copy of the check.

Bank Name _____ City/State _____ Check # _____

Routing Number: _____ Account # _____

***** REQUIRED – GET YOUR 3 CREDIT REPORTS & SCORES NOW *****

****FREE for 30 days then only \$9.95 per month – We suggest that you keep it open for at least 90 days so that we can update your scores, otherwise you will have to buy the 3 scores again to see your changes at the end of the credit restoration, but you may cancel before the end of 30 days****

Go to CreditKeeper.com - User Name: _____ Password: _____

Security Question Answer: _____

(For office use only): EXPERIAN REPORT#: _____ USERNAME: _____

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These are instructions for www.creditkeeper.com to obtain your three Credit Reports and Credit Scores.

1. Go to their website – www.creditkeeper.com
2. Click on “**Enroll Now**”
3. Complete the Registration, including entering your credit/debit card info, and click “Submit”. You can cancel within 30 days with no charge on your Credit Card, but we suggest keeping it for 90 days at the \$9.95 so that we can monitor your credit and score changes. It is up to you but you may have to purchase your scores after the 90 day period.
4. Write down the **Username** you create and your **Password (VERY IMPORTANT)**, then click “Continue”
5. Click on “**ACCESS CREDIT REPORTS**” (shown in red under “Monitor”)
6. Click on “**CREDIT REPORT**” (shown in red)
7. Verify your SS#, create a security word (8-15 letters only), write it down (**VERY IMPORTANT**) and click “**Submit**”
8. Click “**Submit**” again
9. Answer the security questions to verify your identity, then click “**Continue**”
10. Click on “**Go To Credit Center**” and wait while it’s “Processing”
11. Click on “**View Full Report**”
12. Print and save your report on your computer to view it later, so you don’t get “timed-out” of the system.
13. Write your creditkeeper.com **Username, Password, and Security Question Answer** in their proper spots on the **Client Consultation & Information Form**
14. Store your creditkeeper.com **Username, Password, and Security Question Answer** in two safe places where you can find them easily for later use.