

(Your Company) aspires to be the leading provider of financial information and solutions for those who are accumulating wealth and planning to retire as well as our senior citizens.

We provide added value to our clients through a comprehensive financial analysis and retirement planning coupled with the products necessary to reach their goals. People are the motivation for our success. We are committed to fostering an environment of continuous learning and development, with honest communication and maintaining the highest standards of business ethics and integrity. We also value diversity and commit ourselves to helping people realize their true financial potential.

Company Name

**Uncomplicated
Solutions to
Financial Independence**

Company Address and contact information



Comprehensive Financial Consulting Services

(Your Company) will provide uncomplicated solutions to financial independence for you through proper analysis and retirement planning coupled with the products necessary to reach your goals. **People are the motivation for our success.**

Realizing your dreams

We all work hard every day to earn an income. (Your Company) realizes this and would like to assist you in planning and fulfilling your retirement dream.



Unfortunately, most people do not plan to fail, but they fail to plan. **Our associates are committed to helping these people find their true financial potential.**

Securing Your Future

Financial Independence does not refer to the accumulation of wealth alone. (Your Company) is able to provide you with a comprehensive needs analysis which may include life insurance, long term care, disability and various

investment products to fulfill your individual retirement needs. **In working with us you are buying a promise, a promise that we will always be there when you need us.**

Diversifying Funds

Whether you are the type of person who prefers the more conservative approach to investing or the person who prefers a more aggressive approach, we at (Your Company) have a solution. If you want safety of premium, tax advantages, accessibility when you need it and a chance to have a lifetime income we have products that fit your needs. If you want the opportunity to possibly make greater returns on your investments we offer a wide variety of managed plans. **We invite you to protect your tomorrow by acting today.**



Summary

In taking advantage of our services we will provide you with an uncomplicated solution to financial independence by using a responsible and conservative approach to asset preservation. **Our goal is simple each morning you will wake up with more money than you had yesterday. And you can go to bed each night knowing that tomorrow you will have more money than you had today. Please don't fail to plan... Call or visit our website today.**

Advantages to YOU

- Complete Retirement Needs Analysis
- Professionally Licensed Financial Advisors with over 40 years of combined experience.
- Team of Professionals including a Certified Financial Planner, Certified Public Accountant, Attorney, Tax Advisor, and Fully Licensed Life, Health and Annuity Agents
- Work only with Financially Strong and Nationally Recognized Companies
- Comprehensive line of Retirement Solutions including Annuities and other investment options, Long Term Care, Life Insurance and Disability Insurance.

Annuity Features

- Guaranteed Principle & Interest Earnings
- Medicaid "Spend-Down"
- Tax Deferred
- Protection from Legal Action
- Avoids Probate
- Liquidity
- Reserves

Please don't fail to plan... visit our website today at (Your Web Address) or call one of our locations on the reverse side of this brochure.